



Microsoft® Office Outlook® 2007 Inside Out

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Creating and Managing Your Contacts

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The Contacts folder in Microsoft® Office Outlook® 2007 is an electronic tool that can organize and store the thousands of details you need to know to communicate with people, businesses, and organizations. You can use the Contacts folder to store e-mail addresses, street addresses, multiple phone numbers, and any other information that relates to a contact, such as a birthday or an anniversary date.

From a contact entry in your list of contacts, you can click a button or choose a command to have Office Outlook 2007 address a meeting request, an e-mail message, a letter, or a task request to the contact. If you have a modem, you can have Outlook 2007 dial the contact's phone number. You can link any Outlook 2007 item or 2007 Microsoft Office system document to a contact to help you track activities associated with the contact.

Outlook 2007 allows you to customize the view in the Contacts folder to review and print your contact information. You can sort, group, or filter your contacts list to better manage the information or to quickly find entries.

Outlook 2007 integrates well with Microsoft Windows® SharePoint® Services (WSS) and SharePoint Portal Server, both of which provide the means for users to share documents, contacts, messages, and other items through a Web-based interface. You can import contacts from Outlook 2007 to a WSS site, or vice versa.

Outlook 2007 also supports the use of vCards, the Internet standard for creating and sharing virtual business cards. You can save a contact entry as a vCard and send it in an e-mail message. You can also add a vCard to your e-mail signature.

This chapter discusses contact management in Outlook 2007. The Outlook 2007 Contacts feature provides powerful tools to help you manage, organize, and find important contact information.

Working with the Contacts Folder

The Contacts folder is one of the Outlook 2007 default folders. This folder stores information such as name, physical address, phone number, and e-mail address for each contact. You can use the Contacts folder to quickly address e-mail messages, place phone calls, distribute bulk mailings through mail merge (in Microsoft Office Word 2007), and perform many other communication tasks. The Contacts folder is not, however, the same as your address book. Your Outlook Address Book lets you access the Contacts folder for addressing messages, but the Address Book also lets you access addresses stored in personal address books and Microsoft Exchange Server address lists.

For detailed information about working with address books in Outlook 2007, see Chapter 6, “Managing Address Books and Distribution Lists.”

You can open the Contacts folder either by clicking the Contacts button in the Navigation Pane or by opening the Folder List and clicking Contacts. When you open the folder, you’ll see its default view, Business Cards, which displays contact entries as virtual business cards that show name, address, phone number, and a handful of other items for each contact, as shown in Figure 18-1. Outlook 2007 provides several predefined views for the Contacts folder that offer different ways to display and sort the contacts list.

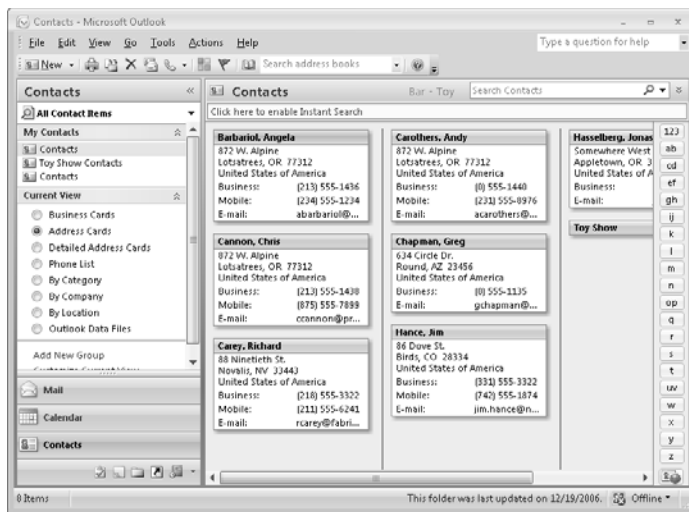


Figure 18-1. Use the Contacts folder to manage contact information such as address, phone number, and fax number for your business associates and friends.

For details about the available views in the Contacts folder and how to work with them, see “Viewing Contacts” later in this chapter.

Note

You can use the alphabet index on the right in the folder window to quickly jump to a specific area in the Contacts folder. For example, click the M button to jump to the list of contacts whose names begin with M.

When you double-click an entry in the Contacts folder, Outlook 2007 opens a contact form similar to the one shown in Figure 18-2. This multitabbed form lets you view and modify a wealth of information about the person. You also can initiate actions related to the contact. For example, you can click the Call button in the Communicate group on the Contact tab on the Ribbon to dial the contact's phone number. You'll learn more about these tasks throughout the remainder of this chapter. The following section explains how to create a contact entry and also introduces the tabs on the Ribbon to help you understand the types of information you can store.

The screenshot shows the 'Pilar Ackerman - Contact' window in Outlook 2007. The window has a ribbon with tabs: Contact, Insert, and Format Text. The 'Contact' tab is active, showing a ribbon with groups: Actions (Save & New, Send, Delete), Show (Details, All Fields, Activities), Communicate (E-mail, Meeting, Call, Web Page, Map), Options (Business Picture, Categorize, Follow Up), and Proofing (Spelling). The main area is divided into sections: Personal Information (Full Name, Company, Job title, File as), Internet (E-mail, Display name, Web page address, IM address), Phone numbers (Business, Home, Business Fax, Mobile), and Addresses (Business, with a checkbox for 'This is the mailing address'). A preview of the contact's business card is shown on the right, and a 'Notes' section is at the bottom right.

Personal Information

Full Name: Pilar Ackerman
 Company: Lucerne Publishing
 Job title: Publisher
 File as: Ackerman, Pilar

Internet

E-mail: pilar.ackerman@lucernepublishing.com
 Display name: Pilar Ackerman (pilar.ackerman@lucernepublishing.com)
 Web page address:
 IM address:

Phone numbers

Business: (423) 555-3231
 Home:
 Business Fax:
 Mobile:

Addresses

Business: 43 W. Lake
 Watertown, NH 42041
 United States of America
☒ This is the mailing address

Business Card Preview:

Pilar Ackerman
 Lucerne Publishing
 Publisher
 (423) 555-3231 Work
 pilar.ackerman@lucernepublishing.com
 43 W. Lake
 Watertown, NH 42041
 United States of America

Notes:

Price List

Figure 18-2. The General page of a contact form shows address, phone, and other information about the contact.

Creating a Contact Entry

To create a contact entry, you can start from scratch, or you can base the new entry on a similar existing entry—for example, the entry for a contact from the same company.

You can open a contact form and create a new entry from scratch in any of the following ways:

- Choose File, New, Contact.
- Right-click a blank area in the Contacts folder (not a contact entry), and then choose New Contact.
- With the Contacts folder open, click New or press **Ctrl+N**.
- In any other folder view (such as Messages), click the arrow next to the New button on the toolbar, and then choose Contact.

When the contact form opens, type the contact's name in the Full Name box and enter the information you want to include for the contact, switching tabs as needed. To save the entry, click Save & Close. To save this entry and continue to add contacts, click Save And New.

Filling in the information on the contact form is straightforward. You might find a few of the features especially useful. For example, the File As drop-down list allows you to specify how you want the contact to be listed in the Contacts folder. You can choose to list the contact in either Last Name, First Name format or First Name, Last Name format; to list the contact by company name rather than personal name; or to use a combination of contact name and company name.

You can also store more phone numbers in the contact entry than the four that are displayed on the form. When you click the down arrow next to a phone number entry, as shown in Figure 18-3, you see a list of possible phone numbers from which you can select a number to view or modify; the checked items on the list are those that currently contain information. When you select a number, Outlook 2007 shows it on the form.

In addition to storing multiple phone numbers for a contact, you also can store multiple physical addresses. Click the down arrow next to the Address button on the form to select a business, home, or other address. (By default, the button is labeled Business.) The E-Mail box can also store multiple addresses; click the down arrow to choose one of three e-mail addresses for the individual. For example, you might list both business and personal addresses as well as a Hypertext Transfer Protocol (HTTP)-based address (such as a Microsoft Hotmail® address) for the contact. The Details page of the contact form, shown in Figure 18-4, lets you add other information, such as the contact's department, office number, birthday, and anniversary. Internet Free/Busy is a feature of Outlook 2007 that allows you to see when others are free or busy so that you can efficiently schedule meetings. Outlook 2007 users have the option to publish their free/busy information to a user-specified URL file server, which you can enter in the Address box.

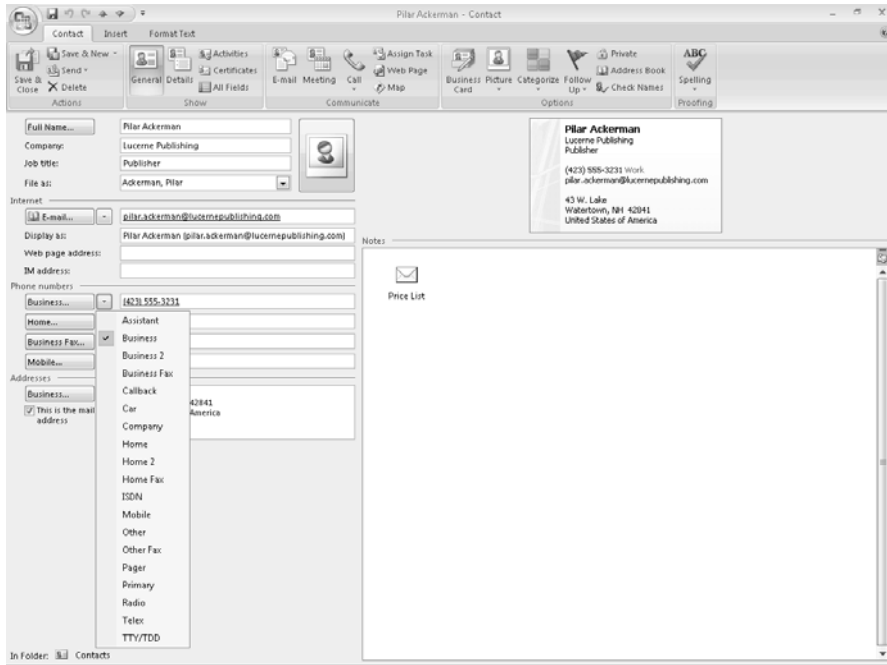


Figure 18-3. You can store multiple phone numbers for a contact, but only four appear on the form at one time.

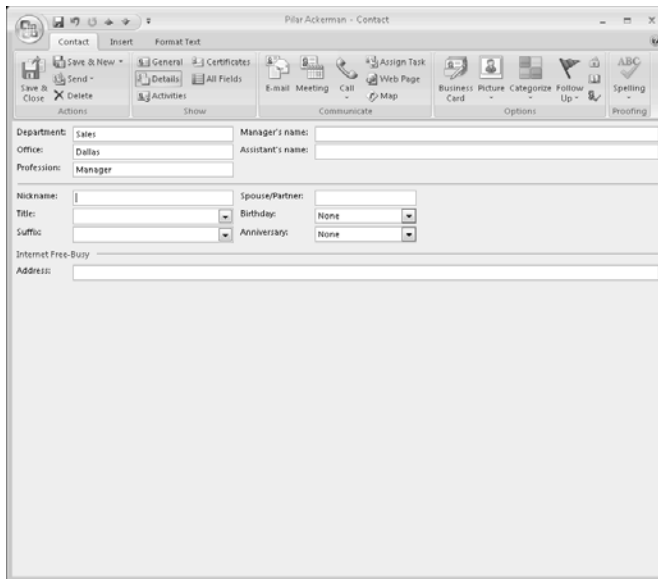


Figure 18-4. The Details page stores additional information—both business and personal—about the contact.

The Activities page of the contact form is useful for locating e-mail messages, logged phone calls, and other items or activities associated with a specific contact. For information about using the Activities page, see “Associating a Contact with Other Items and Documents” later in this chapter.

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Add contacts quickly

When you use one of the table views (such as Phone List) to display your Contacts folder, you'll see a row at the top of the list labeled Click Here To Add A New Contact. This is a handy way to enter a contact's name and phone number quickly—simply type the information directly in the row, and Outlook 2007 adds the contact entry to the folder.

Creating Contact Entries from the Same Company

If you have several contacts who work for the same company, you can use an existing contact entry to create a new entry. Simply select the existing entry in Business Cards or Address Cards view, and then choose Actions, New Contact From Same Company. Outlook 2007 opens a new contact form with all the company information (name, address, and phone numbers) supplied—all you have to do is fill in the personal details for that individual.

Note

You can also use a template to create multiple contact entries that share common data such as company affiliation. For information about working with templates in Outlook 2007, see Chapter 25, “Using Templates.”

Creating a Contact Entry from an E-Mail Message

When you receive an e-mail message from someone you'd like to add to your contacts list, you can create a contact entry directly from the message. In the From box of the message form or in the InfoBar in the Reading Pane, right-click the name, and then choose Add To Outlook Contacts on the shortcut menu. Outlook 2007 opens a new contact form with the sender's name and e-mail address already entered. Add any other necessary data for the contact, and then click Save & Close to create the entry.

Copying an Existing Contact Entry

In some cases, you might want to create a copy of a contact entry. For example, although you can keep both personal and business data in a single entry, you might

want to store the data separately. You can save time by copying the existing entry rather than creating a new one from scratch.

To copy a contact entry in the Contacts folder, right-click and drag the entry to an empty spot in the folder, and then choose Copy. Outlook 2007 displays the Duplicate Contact Detected dialog box. Click Add New Contact, and then click Add to create a new entry containing all the same information as the original. You also can copy contact information to another folder. Open the folder where the contact entry is stored, and then locate the destination folder in the Navigation Pane or in the Folder List. Right-click and drag the contact entry to the destination folder, and then choose Copy on the shortcut menu.

Creating Other Contacts Folders

In addition to providing its default Contacts folder, Outlook 2007 allows you to use multiple contacts folders to organize your contacts easily. For example, you might use a shared contacts folder jointly with members of your workgroup for business contacts and keep your personal contacts in a separate folder. Or you might prefer to keep contact information you use infrequently in a separate folder to reduce the clutter in your main Contacts folder. The process of creating a contact entry in any contacts folder is the same regardless of the folder's location—whether it is part of your Exchange Server account or in a personal folders (.pst) file, for example.

To create a new folder for storing contacts, follow these steps:

1. Choose File, New, Folder, or right-click the Folder List and choose New Folder to open the Create New Folder dialog box, shown in Figure 18-5.

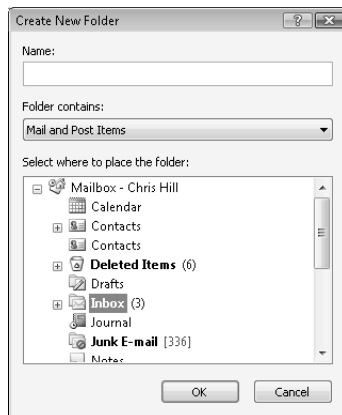


Figure 18-5. Use the Create New Folder dialog box to create new Outlook 2007 folders.

2. In the Name box, type a name for the folder. This is the folder name that will be displayed in Outlook 2007 (in the Navigation Pane and in the Folder List, for example).

3. Select Contact Items in the Folder Contains drop-down list.
4. In the Select Where To Place The Folder list, select the location for the new folder.
5. Click OK.

When you create a new contacts folder using this method, Outlook 2007 sets up the folder using default properties for permissions, rules, description, forms, and views. If you want to create a new contacts folder that uses the same custom properties as an existing folder, you can copy the folder design, as explained in the following section.

Copying the Design of a Folder

Another way to set up a new contacts folder is to copy the design of an existing contacts folder to the new one. Folder design properties include permissions, rules, description, forms, and views.

Note

You can copy a folder design as described here only for folders that are contained in an Exchange Server mailbox.

To copy the design of an existing contacts folder, follow these steps:

1. In the Folder List, click the contacts folder to which you want to copy the folder properties.
2. Choose File, Folder, Copy Folder Design.
3. In the Copy Design From dialog box, shown in Figure 18-6, select the folder with the design you want to copy.

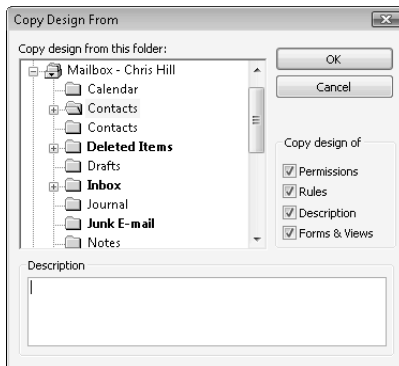


Figure 18-6. In the Copy Design From dialog box, select the folder with the design you want to copy.

4. In the Copy Design Of area, select the specific properties you want to copy.
5. Click OK. An Outlook 2007 prompt warns you that the existing properties of the current folder will be replaced with properties from the source folder. Click Yes to perform the copy, or click No to cancel.

Copying a folder's properties this way does not copy the contents of the folder—it copies only the selected properties. It is also different from copying the folder itself, which copies the contents of the folder to a new location.

For more information about copying folders, see “Using and Managing Folders” in Chapter 30.

Working with Contacts

You can do much more with your Outlook 2007 contacts list than just view address and phone information. Outlook 2007 provides a set of tools that make it easy to phone, write, e-mail, or communicate with contacts in other ways. This section explains these tools.

Associating a Contact with Other Items and Documents

As you work with contacts, it's useful to have e-mail messages, appointments, tasks, documents, or other items related to the contact at your fingertips. You can relate items to a contact by inserting one Outlook 2007 item in another. For example, if you create a task to call several of your contacts, you can use the Attach Items button on the Insert tab to insert those contacts in the task:

1. With the task open, click Attach Item on the Insert tab.
2. Select the contacts in the resulting Insert Item dialog box, shown in Figure 18-7.
3. Click OK to insert the item.

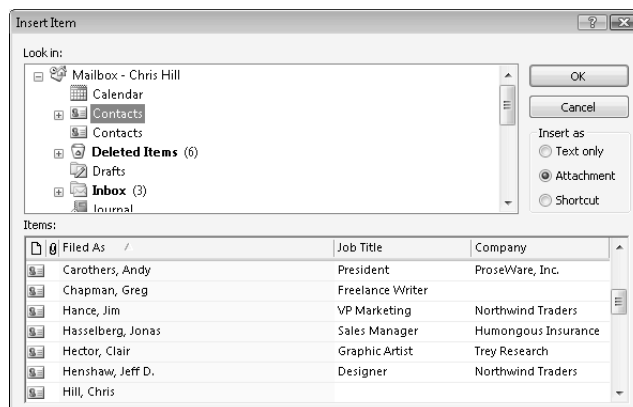


Figure 18-7. Use the Insert Item dialog box to associate contacts with a task.

For details on setting up tasks, see “Working with Tasks in the Tasks Folder” in Chapter 22.

E-mail messages that you send to a contact are automatically associated to that contact and appear on the Activities page of the contact form (discussed shortly). In addition, most items you create using the Actions menu are automatically associated with the contact entry and appear on the Activities page. For example, if you choose Actions, New Task For Contact to create a new task for a contact, Outlook 2007 associates the task with the contact.

On the Contact tab of the Ribbon of any contact form, clicking the Activities button in the Show group displays all the items associated with that contact, as shown in Figure 18-8. Outlook 2007 searches for links to items in the main Outlook 2007 folders, including Contacts, e-mail (Inbox and other message folders), Journal, Notes, Tasks, and Calendar.

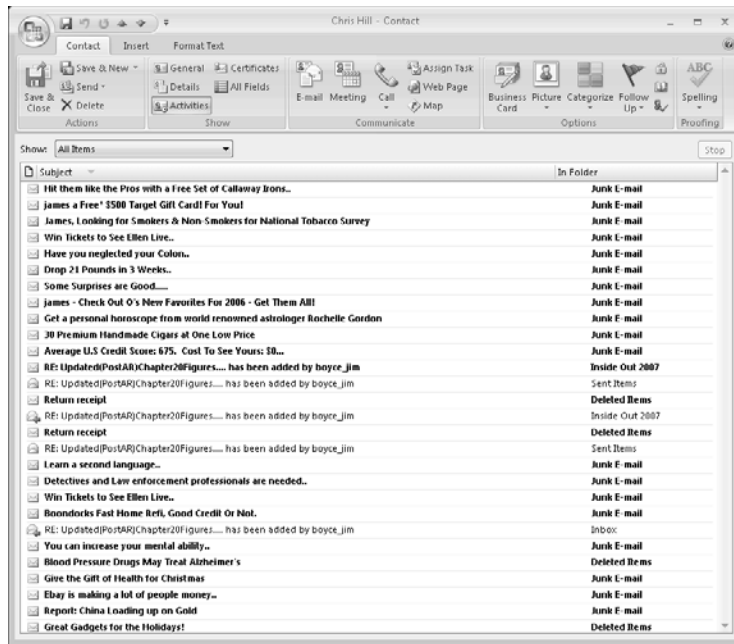


Figure 18-8. The Activities page shows all items linked to the contact.

What good is the Activities page? It's extremely useful for finding items associated with a specific contact. For example, you could sort the Inbox by sender to locate an e-mail message from a particular person, or you could use the Activities page of his or her contact form to achieve the same result. You could also view a list of the tasks assigned to an individual by checking the Activities page. Although you can view these associations in other folders, the Activities page not only offers an easier way to view the links but also lets you see all linked items, not just specific types of items.

Associating Contacts and Documents

In many cases, you might want to insert one or more documents in a contact. For example, assume that you manage contracts for several individuals or companies. You can insert a contract document into the contact covered by the contract to make it easier to open the document from the contact form. With this association, you don't need to remember the document name if you know the name of the contact with whom it is associated.

Follow these steps to insert a document in a contact:

1. Open the Contacts folder, open the contact item, and then click the Insert tab.
2. Click Attach File.
3. Locate the files you want to associate with the contact, and then click Insert.
4. The link now appears in the Notes area of the contact details.
5. Click the Contact tab, and then click Save & Close to create the link.

When you want to open the document, simply open the contact form and click the link in the Notes section.

In the preceding example, you actually inserted the document in the contact item. An alternative is to insert a hyperlink to the document in the contact item. The advantage to this method is that you are not duplicating the document—it remains in its original location on disk. When you need to open the document, you can click the hyperlink in the contact item. Or you can open the document from its location on disk.

Linking a document in a contact is easy. In step 3 of the preceding example, rather than click Insert, click the down arrow next to the Insert button, and then select Insert As Hyperlink.

Removing a Link

Occasionally, you'll want to remove a link between a contact and another item. For example, perhaps you've accidentally linked the wrong document to a contact, or perhaps the contact who had been associated with a particular project has taken a different job.

To remove a link from a contact to an item, follow these steps:

1. Open the contact item, and then on the Contact tab, in the Show group, click Activities.
2. Right-click the link to the item you want to remove, and then choose Delete.

Note

Although you can remove the contact association in a task, doing so removes the task from the contact's Activities page only if the task is assigned to someone other than the linked contact. If the contact owns the task, the task continues to be listed on the Activities page even after the task is marked as completed.

Assigning Categories to Contacts

A *category* is a keyword or a phrase that helps you keep track of items so that you can easily find, sort, filter, or group them. Use categories to keep track of different types of items that are related but stored in different folders. For example, you can keep track of all the meetings, contacts, and messages for a specific project when you create a category named after the project and then assign items to it.

Categories also give you a way to keep track of contacts without putting them in separate folders. For example, you can keep business and personal contacts in the same contacts folder and use the Business and Personal categories to sort the two sets of contacts into separate groups.

One quick way to assign categories to a contact is to right-click the contact item, choose Categorize, and then click a category. If the category you want doesn't appear in the category list, choose All Categories on the shortcut menu. Then, in the Color Categories dialog box, you can select the check boxes next to the categories you want to assign to the contact. Alternatively, you can open the contact item, click the Categorize button on the contact form, and select a category, or click All Categories to open the Color Categories dialog box. This dialog box is useful not only for assigning categories but also for reviewing the categories you've already assigned to an item.

For more information about how to assign a category to a contact; how to use categories to sort, filter, and group contact items; and how to create your own categories, see Chapter 5, "Creating and Using Categories."

Resolving Duplicate Contacts

If you create a contact entry using the same name or e-mail address as an entry that already exists in your Contacts folder, Outlook 2007 displays the Duplicate Contact Detected dialog box, in which you can choose to either add the new contact entry or update your existing entry with the new information, as shown in Figure 18-9.

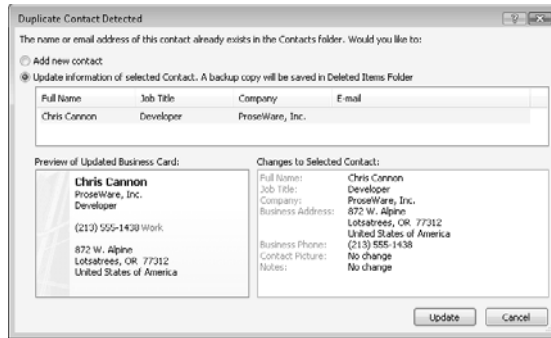


Figure 18-9. Use the Duplicate Contact Detected dialog box to tell Outlook 2007 how to handle a duplicate contact.

If you select the first option, Outlook 2007 adds the new contact to your Contacts folder, and you'll now have two entries listed under the same name or e-mail address. In that case, you'll probably want to add some information to the contact forms—perhaps company affiliation or a middle initial—to distinguish the two entries.

If you select the second option, to update the existing entry with information from the new one, Outlook 2007 compares the fields containing data in both entries and copies the data from the new entry into any fields that have conflicting data. For example, if you have a contact named Chris Ashton whose phone number is 555-5655, and you create a new contact entry for Chris Ashton with a new phone number, Outlook 2007 copies the new number into the existing entry and leaves the other fields the same.

Not all data is simply copied, however. Outlook 2007 does not copy any categories you've assigned to the new entry or any text that appears in the message box of the new entry. If you want to copy data from these fields from a new entry into an existing entry, you must copy that data manually. Likewise, if you've added links to items other than contacts on the Activities page of the new contact form (links to tasks or appointments, for example), Outlook 2007 does not copy them. Certificates and links to contacts on the Activities page are copied from the new entry and added to the existing entry without replacing the original information.

In case you need to revert to the information in the original contact entry, a copy of the original entry is stored in your Deleted Items folder whenever Outlook 2007 copies new data.

Note

If you are adding many contacts, Outlook 2007 can save the information faster if you do not require the program to detect duplicates. To turn off duplicate detection, choose Tools, Options. Click Contact Options, and then clear the Check For Duplicate Contacts check box.

Phoning a Contact

If you have a modem, you can use Outlook 2007 to dial any phone number you specify, including phone numbers for contacts in your contacts list.

To make a phone call to a contact using Outlook 2007, follow these steps:

1. Open the Contacts folder.
2. Right-click a contact item, and then choose Call Contact to open the New Call dialog box with the contact's phone number already entered, as shown in Figure 18-10. You can also click the Dial button on the toolbar, or if the contact form is open, click the Call button in the Communicate group on the Contact tab of the Ribbon.

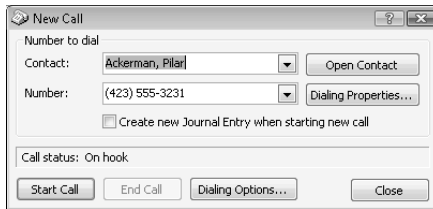


Figure 18-10. Select the number to call and other options in the New Call dialog box.

- If you want Outlook 2007 to use a phone number associated with a different contact, type the contact's name in the Contact box, and then press **Tab** or click in the Number box. Alternatively, you can simply type the phone number in the Number box.
 - If the contact entry for the person you're calling already includes phone numbers, select the phone number in the Number box. If the contact entry doesn't specify a phone number, type the number in the Number box.
3. To keep a record of the call in the journal, select the Create New Journal Entry When Starting New Call check box. If you select this check box, a journal entry opens with the timer running after you start the call. You can type notes in the text box of the journal entry while you talk.
 4. Click Start Call.
 5. Pick up the phone handset, and begin the call.
 6. If you created a journal entry for the call, click Pause Timer to stop the clock when you've finished the call, and then click Save & Close.
 7. Click End Call, and then hang up the phone.

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Keep track of phone calls

If you want to time a call and type notes in Outlook 2007 while you talk, you can create a journal entry for the call as you dial. The journal entry form contains a timer that you can start and stop and also provides space to type notes. For example, you might want to use this option if you bill clients for time spent on phone conversations. For more information about using the journal for phone calls, see Chapter 23, "Tracking Documents and Activities."

Note

If you omit the country code and area code from a phone number, the automatic phone dialer uses settings from the Dialing Properties dialog box, which you can access through the Phone And Modem Options icon in Control Panel or by clicking Dialing Properties in the New Call dialog box. If you include letters in the phone number, the automatic phone dialer does not recognize them.

Setting Up Speed Dial Entries

If you make frequent calls to particular phone numbers, you can create a speed dial list of those phone numbers and quickly make calls from the list. Before you become enamored with the idea of the Outlook 2007 speed dialing feature, however, you should understand that it suffers from a flaw that renders it only moderately useful. Although you can add names and numbers to the speed dial list, Outlook 2007 keeps only the numbers and loses the names. If you remember whom a particular number belongs to, this isn't a problem. However, if you have more than a few numbers on the list, the speed dial feature won't do you much good.

Follow these steps to create entries in the speed dial list:

1. Open the Contacts folder, and then choose Actions, Call Contact, New Call to open the New Call dialog box. Alternatively, you can click the Dial button on the Standard toolbar.
2. Click Dialing Options to display the Dialing Options dialog box.
3. If the person's contact information is stored in the Contacts folder, type the name in the Name box, and then press **Tab** to move to the Phone Number box, where Outlook 2007 automatically fills in the phone number from the contact entry. If you need to use a different number, select it from the drop-down list or type the number in the Phone Number box.
4. Click Add to add the entry to the speed dial list, shown in Figure 18-11.

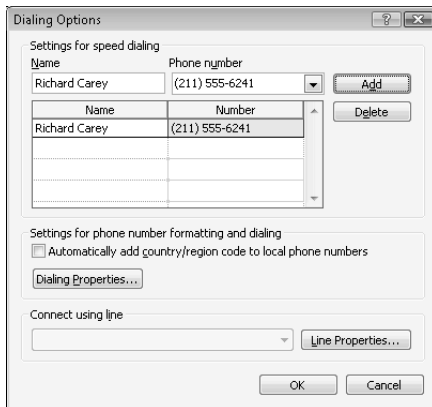


Figure 18-11. Use the Dialing Options dialog box to add speed dial numbers.

5. Repeat these steps to add other numbers as needed, and then click OK.
6. Click Close to close the New Call dialog box.

Note

To dial a speed dial number, click the arrow next to the Call button on the Standard toolbar, click Speed Dial, and then click a speed dial entry in the corresponding list.

Redialing Recently Dialed Numbers

In addition to using the speed dial list, you also can select a phone number from a list of numbers you've recently dialed. To do so, choose Actions, Call Contact, Redial, and then choose the number you want to dial on the menu.

Sending an E-Mail Message to a Contact

If you're working in the Contacts folder, you can send an e-mail message to one of your contacts without switching to the Inbox folder. This is a handy feature that can save a lot of time in an average work day.

Here's how to send a message from the Contacts folder:

1. In the Contacts folder, select the contact item, click Actions, Create, and then select New Message To Contact. Or simply right-click the contact, click Create, and then click New Message To Contact.
2. In the Subject box, type the subject of the message.

3. In the message body, type the message.
4. Click Send.

Connecting to a Contact's Web Site

It seems everyone has a Web site these days, whether it's a company's site or a collection of family photos. If you have the URL for a contact's Web page recorded in the contact entry, you can connect to that site directly from Outlook 2007. This is particularly handy for linking to business sites from a company contact entry—for example, you might create a link to the company's support or sales page. Associating Web sites with contacts is often more meaningful than simply storing a URL in your Favorites folder.

With the contact item open, you can connect to the contact's Web site by performing one of the following actions:

- Click on Web Page in the Communicate group on the Contact tab.
- Press **Ctrl+Shift+X**.
- Click the hyperlink that appears in the Web Page Address box in the contact entry.

Scheduling Appointments and Meetings with Contacts

Many Outlook 2007 users believe that the Calendar folder is the only place you can easily schedule a new appointment or meeting, but that's not the case. You can schedule an appointment or a meeting in any Outlook 2007 folder. The Contacts folder, however, is a logical place to create new appointments and meetings because those events are often associated with one or more contacts stored in the Contacts folder.

Scheduling a Meeting with a Contact

Meetings differ from appointments in that they are collaborative efforts that involve the schedules of all the attendees. When you set up a meeting, Outlook 2007 creates and sends meeting requests to the individuals you want to invite. You can create meeting requests for any number of contacts through the Contacts folder, saving the time of switching folders.

To send a meeting request to one or more of your contacts from the Contacts folder, follow these steps:

1. Open the Contacts folder, and then select the contact entries for those people you want to invite to the meeting. (To select multiple entries, hold down the **Ctrl** key and click the entries.)
2. Choose Actions, Create, and then select New Meeting Request To Contact.
3. In the Subject box, type a description of the proposed meeting.

4. In the Location box, type the location.
5. Enter the proposed start and end times for the meeting.
6. Select any other options you want.
7. Click Send.

For details about setting up meetings and sending meeting requests, see Chapter 21, "Scheduling Meetings and Resources."

Assigning a Task to a Contact

The Tasks folder in Outlook 2007 offers a handy way to keep track of your work and the work you delegate to others. For example, if you manage a group of people, you probably use the Tasks folder to assign tasks to the people who work for you. However, if you need to assign a job to one of your contacts, you can do this directly from the Contacts folder. Doing so adds the contact's name to the Contacts box in the task request.

Follow these steps to assign a task to a contact:

1. In the Contacts folder, select the contact, choose Actions, Create, and then select New Task For Contact. Or simply right-click the contact, choose Create, and then select New Task For Contact.
2. Outlook 2007 opens a new task form. Enter the subject and other information about the task, and then click Assign Task. Outlook 2007 adds the contact's e-mail address in the To box. Enter other information as needed, such as start and stop dates for the task.
3. Click Send to send the task request.

Flagging a Contact for Follow-Up

You can flag a contact item for follow-up to have Outlook 2007 remind you to call or e-mail the contact. For example, suppose that you want to make a note to yourself to call a colleague at 10:00 A.M. tomorrow to ask about the status of a project. You could create a note in the Notes folder, create a task, or add an appointment to your schedule—but an easy way to create the reminder is to add a follow-up flag to the contact entry in the Contacts folder. Flagging a contact item adds an additional field to the contact data. The flag text appears in the contacts list, as shown in Figure 18-12, and shows up as a message on the contact form, as shown in Figure 18-13. You can also organize the view in the Contacts folder to show contacts sorted by flag: choose View, Current View, By Follow-Up Flag to view contacts organized by follow-up flag.

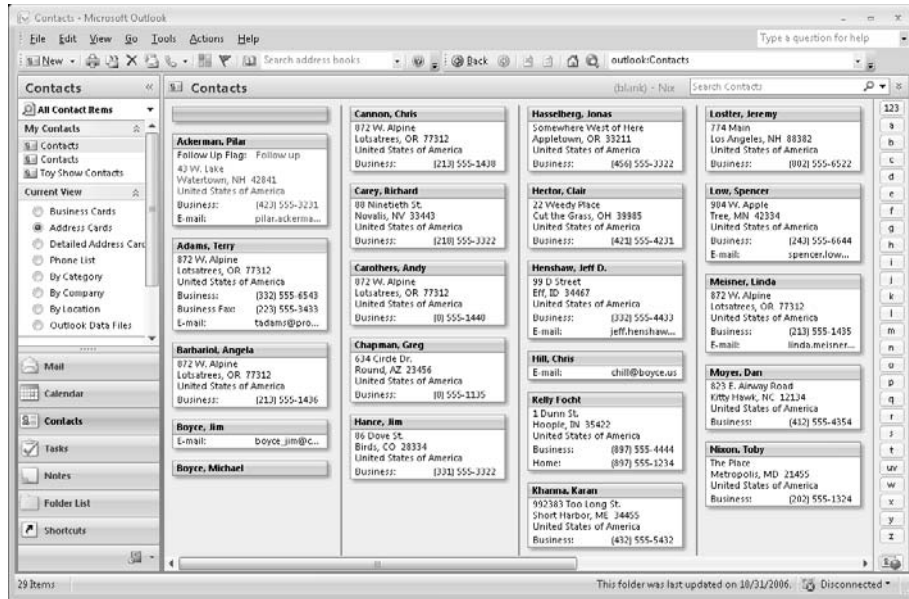


Figure 18-12. The follow-up flag appears in the contacts list.

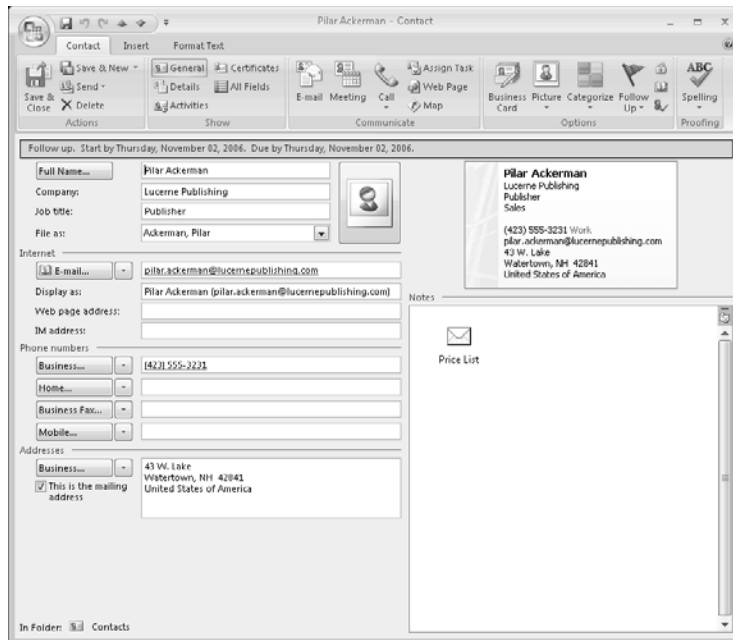


Figure 18-13. Outlook 2007 displays a message on the contact form indicating that a follow-up is needed for the contact.

If you specify a particular date and time for follow-up when you add the flag, Outlook 2007 generates a reminder at the appointed time. Adding a reminder helps ensure that you don't forget to follow up with the contact at the appropriate time.

Follow these steps to flag a contact for follow-up:

1. In the Contacts folder, select the contact that you want to flag, and then choose Actions, Follow Up. Or right-click the contact, and then choose Follow Up.
2. If one of the default follow-up time options suits you, click it. If not, click Custom to open the Custom dialog box.
3. In the Flag To box of the Custom dialog box, shown in Figure 18-14, select the flag text you want Outlook 2007 to use, or type your own flag text.



Figure 18-14. Use the Custom dialog box to specify the flag text and set an optional reminder.

4. Select a start date in the Start Date drop-down list, and then select a due date in the Due Date drop-down list.
5. If you want a reminder, click the Reminder option, select a date, and then specify a time.
6. Click OK. Outlook 2007 adds the flag text to the contact item and adds an entry to your task list.

When you have completed your follow-up action, you can remove the flag from the contact item (clear the flag) or mark the follow-up as completed. If you clear the flag, Outlook 2007 removes it from the contact item and the task list. If you prefer to have the flag remain, you can mark the follow-up as completed. In this case, the flag remains, but the contact form includes a message indicating that the follow-up was accomplished (and the date). When you choose View, Arrange By, Current View, By Follow-Up Flag to view the Contacts folder sorted by flag, the completed items are grouped together. Use one of the following methods to mark a follow-up flag as completed:

- Select the flagged contact item, click Actions, Follow Up, and then click Mark Complete.
- Right-click the contact item, click Follow Up, and then click Mark Complete.

Use one of the following methods to clear a flag, which removes it from the contact item:

- Select the contact item, click Actions, Follow Up, and then click Clear Flag.
- Right-click the contact item in the Contacts folder, click Follow Up, and then click Clear Flag.

Finding Contacts

If you store only a small list of contacts, finding a particular contact is usually not a problem. As the number of contacts grows, however, it becomes more and more difficult to locate information, especially if you aren't sure about a name. For example, you might remember that a person works for a certain company but can't recall the person's name. Outlook 2007 provides features to help you quickly and easily locate contact information.

Perhaps the easiest method of locating a contact if you know the name is to type the name in the Search Address Books box on the Outlook 2007 Standard toolbar and then press **Enter**. Outlook 2007 locates the contact and displays the contact form. If more than one contact matches the data you've entered, Outlook 2007 displays the Choose Contact dialog box, which lists all the matches to allow you to select the appropriate one, as shown in Figure 18-15.

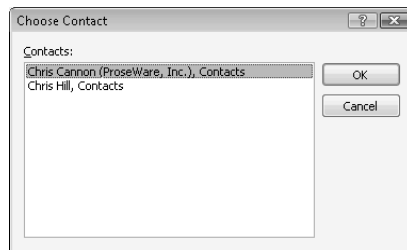


Figure 18-15. Use the Choose Contact dialog box to select the correct contact after a search returns multiple items.

Finally, if you need to perform an advanced search, choose Tools, Instant Search, Advanced Find to open the Advanced Find dialog box, shown in Figure 18-16. You can use this dialog box to perform more complex searches based on multiple conditions, such as searching for both name and company.

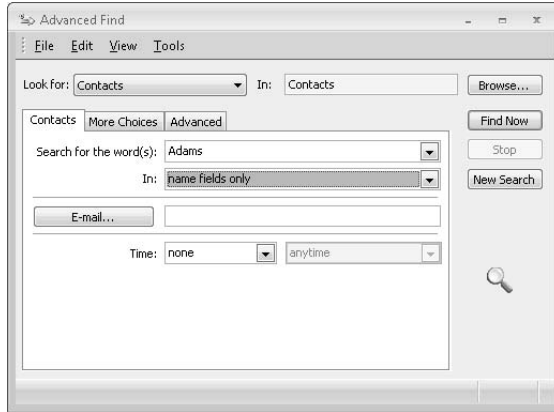


Figure 18-16. Use the Advanced Find dialog box to perform more complex searches using multiple conditions.

For a detailed discussion of how to perform both simple and complex searches in Outlook 2007, see Chapter 33, “Finding and Organizing Outlook Data.”

Making a Common Change to Multiple Contacts

Making changes to a single contact doesn’t take long, but making the same change to several contacts can take a lot of time. You can relieve some of that time drain by propagating a change for a single contact to multiple contacts.

For example, let’s say that your Contacts folder includes contacts for several people who work for the same organization. The organization’s fax number has changed, and now you need to make that change for each contact. Propagating the change to other contacts is a simple drag-and-drop action with the Outlook 2007 capability to group items in the Contacts folder view.

Here’s how to make it happen:

1. Open the folder containing the contacts to be changed.
2. In the Navigation Pane, click the view that best displays the information you need to change. In this example, choose By Company because its table view includes the fax number. Then click View, Arrange By, Custom.

Note

Only table views give you the option of grouping. The Business Cards, Address Cards, and Detailed Address Cards views do not.

3. Click Group By, and in the Group Items By drop-down list, select the item you want to change (in this example, Business Fax). Figure 18-17 shows By Company view grouped by Business Fax.

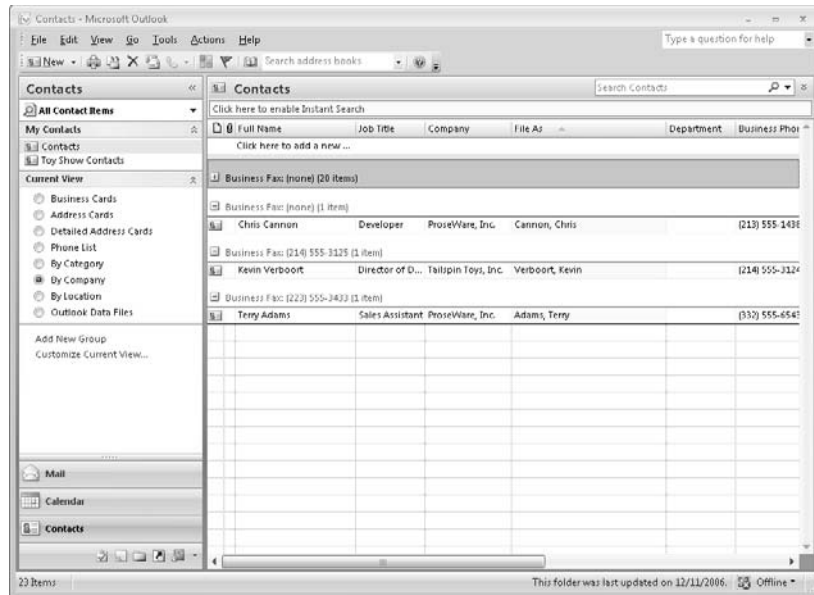


Figure 18-17. By Company view has been grouped by the Business Fax field.

4. In the Expand/Collapse Defaults drop-down list, select All Collapsed. Click OK twice to return to the view you just created.
5. Expand the group that includes the item you want to change.
6. Open one of the contacts, make the needed change, and then save and close the contact. This contact now appears by itself under a different group.
7. To propagate the change, drag the gray grouping bar for the unchanged contacts to the grouping bar for the modified contact. Outlook 2007 makes the change to the other contacts automatically.

Changing multiple items at one time is easy as long as you remember that you need to first display a table view and then group it by the item you want to change. You can either customize an existing view or create a new one. If you customize an existing standard view, you can restore it to its default condition by clicking View, Arrange By, Current View, Define Views, selecting the view, and then clicking Reset.

Viewing Contacts

Outlook 2007 provides predefined views for reviewing your contacts list in the Contacts folder. For example, Address Cards view displays names and addresses of

contacts in small blocks that look like address labels. This view is a convenient way to look up a contact's mailing address. In Phone List view, Outlook 2007 displays contact entries in table rows with details such as phone, job title, and department name in columns. This view is helpful for quickly finding a contact's phone number or job title. You can customize the various standard views to control the amount of detail or to help you organize and analyze information.

Using Standard Views in the Contacts Folder

The Contacts folder offers several standard formats for viewing contacts. To change views, select a view in the Navigation Pane or click View, Current View, and then select the view that you want to use. Two of the standard formats are card views and the rest are table views, as described in the following list:

- **Business Cards** This view shows the contacts in a business card format.
- **Address Cards** This view displays contact entries as individual cards with name, one mailing address, and business and home phone numbers.
- **Detailed Address Cards** This view also displays individual cards, which show name, business and home addresses, phone numbers, and additional details such as job title, company, and Web address.
- **Phone List** This table view displays a list with the contact's name, the company name, business phone number, business fax number, home phone number, mobile phone number, categories, and a check box to enable or disable journaling for the contact.
- **By Category** This view groups contacts by their assigned categories.
- **By Company** This view groups contacts by company, which is helpful when you're trying to find a contact who works for a particular company.
- **By Location** This view groups contacts by country or region.
- **Outlook Data Files** This view shows contacts grouped by their storage location.

Note

You can easily resize address cards by dragging the vertical separator between columns, which changes the width of all card columns.

Customizing Contacts View

The methods of customizing the view in Outlook 2007 folders are generally the same for all folders. This section examines some specific ways you might customize the Contacts folder to make it easier to locate and work with contacts. For example, you might use a specific color for contacts who work for a particular company. You can also

change the fonts used for the card headings and body, specify card width and height, and automatically format contact entries based on rules.

Chapter 27, “Creating Custom Views and Print Styles,” covers additional ways to customize views.

Filtering Contacts View

You can filter the view in the Contacts folder to show only those contacts that meet the conditions you specify in the filter. For example, you can use a filter to view only those contacts who work for a particular company or who live in a particular city.

Follow these steps to set up a view filter in the Contacts folder:

1. Open the Contacts folder, click View, Current View, and then Customize Current View.
2. Click Filter in the Customize View dialog box.
3. In the Filter dialog box, specify the conditions for the filter. If you don't see the items you need to specify for the condition, use the Field drop-down list on the More Choices or Advanced tab to select the necessary field.
4. Click OK to close the Filter dialog box, and then click OK in the Customize View dialog box to apply the filter.

When you want to view the entire contents of the folder again, you can remove the filter, as detailed here:

1. Click View, Current View, and then select Customize Current View.
2. Click Filter.
3. In the Filter dialog box, click Clear All, and then click OK.
4. Click OK to close the View Summary dialog box.

Note

If you want to reset the view to its default properties, click Reset Current View in the Customize Current View dialog box.

Configuring Fonts and Card Dimensions

You can change the font used for card headings and the card body text in the card views (Address Cards view and Detailed Address Cards view). You can also change the font style, size, and script, but not the color.

Follow these steps to change the font for card headings and body text:

1. Click View, Current View, and then select Customize Current View.
2. In the Customize View dialog box, click Other Settings to display the Format Card View dialog box, shown in Figure 18-18.

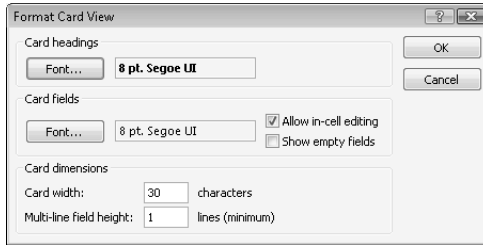


Figure 18-18. Use the Format Card View dialog box to specify the font for card headings and body text.

3. Click Font in the Card Headings or Card Fields area of the dialog box to open a standard Font dialog box in which you can select font characteristics.
4. Make your font selections, and then click OK.
5. Specify options according to the following list, and then click OK:

Allow In-Cell Editing Selecting this check box allows you to modify contact data by clicking a field in the view without opening the contact form.

Show Empty Fields Select this check box if you want to show all fields for all contacts, even if the fields are empty. Clear this check box to simplify the view of your Contacts folder. Note that when this check box is selected, Outlook 2007 displays all fields defined for the view, not all contact fields.

Card Width Set the card width (in number of characters) using this option.

Multi-Line Field Height Use this option to specify the number of lines you want to display on the card for multiline fields.

6. Click OK to close the Customize View dialog box.

Using Automatic Formatting

Outlook 2007 performs some limited automatic formatting of data in the Contacts folder. For example, it uses bold for distribution list items, regular font for unread contacts, and red for overdue contacts (contact entries with an overdue follow-up flag). You can make changes to these automatic formatting rules, and you can even create your own rules. For example, you might want to display overdue contacts in blue rather than in red, or you might want to use a particular color for all contacts who work for a certain company.

Follow these steps to modify the formatting for an existing rule or to create a new rule:

1. Open the Contacts folder. Click View, Current View, and then Customize Current View.
2. Click Automatic Formatting in the Customize View dialog box to display the Automatic Formatting dialog box, shown in Figure 18-19.

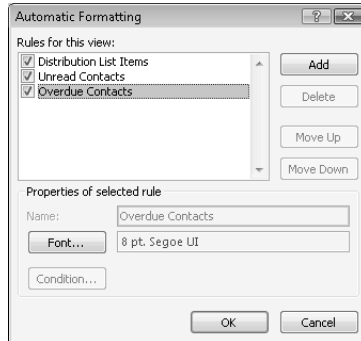


Figure 18-19. Use the Automatic Formatting dialog box to create custom rules that control how Outlook 2007 displays contacts.

3. If you want to modify an existing rule, select the rule, and then click Font to change the font characteristics or click Condition to modify the condition for the rule. If you are changing the condition, skip to step 6. Otherwise, skip to step 7.

Note

You can modify a rule condition only for rules that you have created. You cannot change the condition for the three predefined rules.

4. Click Add if you want to add a new rule. Outlook 2007 creates a new rule named Untitled.
5. Type a new name in the Name field, click Font and specify font characteristics, and then click Condition to open the Filter dialog box, shown in Figure 18-20.

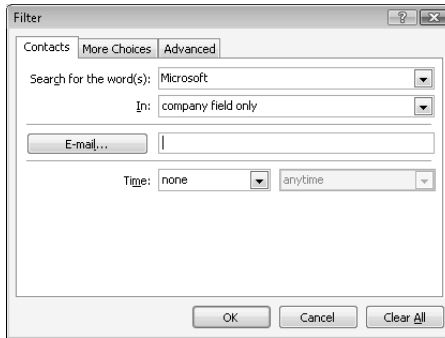


Figure 18-20. You can specify complex conditions using the Filter dialog box.

6. Specify the criteria to define the rule condition. For example, click **Advanced**, click **Field**, click **Frequently Used Fields**, and click **Company**. Then select **Contains** in the **Condition** drop-down list and type a company name in the **Value** box. This will automatically format all contacts from the specified company using the font properties you specify in the next step.
7. Click **OK** to close the Filter dialog box, click **Font** in the Automatic Formatting dialog box, specify the font properties, and then click **OK**.
8. Close the Automatic Formatting and Customize View dialog boxes to view the effects of the new rule.

Note

Automatic formatting rules follow the hierarchy in the list shown in the Automatic Formatting dialog box. Use the **Move Up** and **Move Down** buttons to change the order of rules in the lists and thereby change the order in which they are applied.

Filtering Contacts with Categories

Categorizing contacts allows you to organize your contacts into groups that you create. For example, categories provide an easy way to distinguish all of your personal contacts from business contacts. Categorizing also gives you the ability to group people from different companies who are all involved in the same project. Outlook 2007 provides an easy way for you to categorize your contacts, using color coding to distinguish the categories from each other. You can also define custom labels for categories so that you can identify the category by both color and label.

You can define your categories either by using a color category for the first time or by using the Color Categories dialog box. Outlook 2007 offers three ways to open the Color Categories dialog box:

- Click the Categorize button on the Standard toolbar, and then click All Categories.
- Click Actions, Categorize, and then click All Categories.
- Right-click any contact item, and then choose Categorize, All Categories.

Note

When you use a color category for the first time, Outlook 2007 displays a Rename Category dialog box that lets you change the text associated with the category.

To create a new category and assign a color to it, follow these steps:

1. In the Color Categories dialog box, click New.
2. Type an appropriate name for the category, and then select a color in the drop-down color palette.
3. Click OK.

Note

For quick category assignment, assign a unique shortcut key to each of the categories you use most often. You can assign the shortcut key through the Color Categories dialog box.

You should now see the category you just created in your category list. To assign these categories to your contacts, follow these steps:

1. In the Contacts folder, right-click any item in the contacts list.
2. Click Categorize on the shortcut menu.
3. Select the category you just added in the list.

Now that you have categorized your contacts, it's time to view them. Outlook 2007 has already provided a filter to show your contacts grouped in the way you selected. To view your contacts by category, use one of the following methods:

- In the Navigation Pane, under Current View, select By Category.

- Click View, Current View, and then By Category.
- In the Navigation Pane, select Customize Current View, and then select Filter. Click More Choices, and then click the Category button. Select the category or categories you want to display, and then click OK. Click OK twice more to exit the dialog boxes.

For more information about categories, see Chapter 5, “Creating and Using Categories.”

Printing Contacts

As an experienced user of Windows, you probably need little if any explanation of how to print. So rather than focusing on basic printing commands, this section offers some insight into why you might print from the Contacts folder and what your options are when you do print.

Why print? If you're like most people, you probably try to work from your computer as much as possible and reduce the amount of paper you generate. The completely paperless office is still a distant goal for most people, however, and there will be times when you want to print your contacts list. For example, you might need to take a copy of your contacts with you on a business trip, but you don't have a notebook computer. A hard copy of your contacts is the solution.

Outlook 2007 supports several predefined styles that allow you to print contact information using various formats, including preprinted sheets for several popular day planners. You can print a single contact entry, a selection of entries, or all entries. To print a selection (one or more), first select the contact entries to print by holding down the **Ctrl** key and clicking each one. If you want to print all contacts, choose Edit, Select All, and then choose File, Print to open the Print dialog box, shown in Figure 18-21.

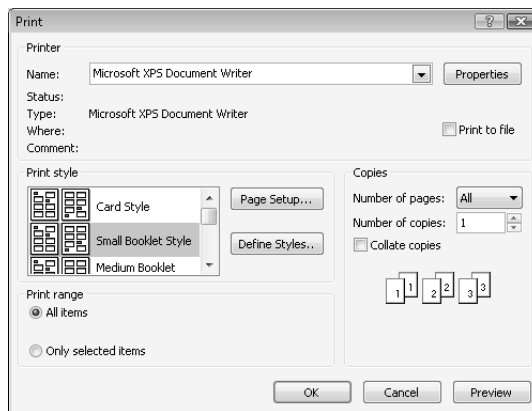


Figure 18-21. You can select several predefined styles in the Print dialog box.

In the Print Style area of the Print dialog box, you can select one of five print styles, each of which results in a different printed layout. You can use the styles as listed, modify them, or create new styles. To modify an existing style, select the style, and then click Page Setup to display the Page Setup dialog box, which resembles the one shown in Figure 18-22.

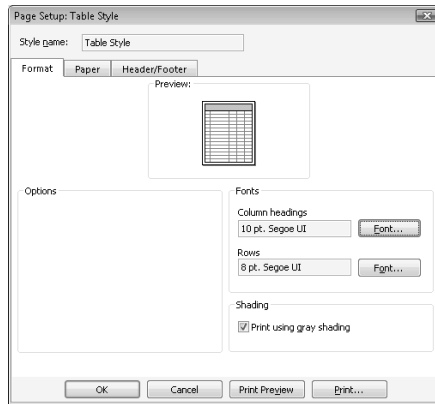


Figure 18-22. Modify a print style in the Page Setup dialog box.

Use the Format tab of this dialog box to specify fonts and shading and to set options such as printing a contact index on the side of each page, adding headings for each letter, and setting the number of columns. Use the Paper tab to select the type of paper, such as a preprinted sheet for your day planner, as well as to set up margins, paper source, and orientation. Use the Header/Footer tab to add a header, a footer, or both to the printout.

If you need a custom layout but don't want to modify the existing styles, you can create your own style. In the Print dialog box, click Define Styles to display the Define Print Styles dialog box, shown in Figure 18-23. Select a style to use as the basis for your new style, and then click Copy to open the Page Setup dialog box. Modify settings as needed, and then click OK to save the new style. Outlook 2007 uses the same name but prefixes the name with *Copy Of* (Copy Of Card Style, for example). You can change the name in the Style Name box in the Page Setup dialog box.



Figure 18-23. Select a style to copy in the Define Print Styles dialog box.

For a detailed discussion of printing in Outlook 2007 and creating custom print styles, see “Printing in Outlook” in Chapter 27.

Custom Contact Printing with Word

Although Outlook 2007 provides several features for printing, your capability to customize the way the printed documents look is rather limited. You can overcome this limitation by using Office Word 2007 rather than Outlook 2007 to print contacts. You have considerable control over how a Word 2007 document looks and is printed, making Word 2007 an excellent tool for custom printing. You can copy data from Outlook 2007 to Word 2007 manually, but it's much more efficient to use a macro to automate the process and make custom contact printing a one-click process. Because the process requires macros and macros haven't yet been covered in detail, refer to Chapter 27, “Creating Custom Views and Print Styles,” which includes a section that explains how to print contacts using Word 2007. It also includes sample macro code that you can tailor to your specific needs.

Working with Distribution Lists

A distribution list is a collection of contacts. It provides an easy way to send messages to a group of people. For example, if you frequently send messages to the marketing team, you can create a distribution list named Marketing Team that contains the names of all members of this team. A message sent to this distribution list goes to all recipients who belong to the list. Outlook 2007 converts the address list to individual addresses, so recipients see their own names and the names of all other recipients in the To box of the message instead of seeing the name of the distribution list. You can use distribution lists in messages, task requests, and meeting requests.

INSIDE OUT

Use nested distribution lists

Distribution lists can contain other distribution lists as well as individual addresses. For example, you might create a distribution list for each of seven departments and then create one distribution list containing those seven others. You could use this second list when you need to send messages to all seven departments.

You can create distribution lists in your Contacts folder using your contacts list. You can store addresses from any available source (the Global Address List [GAL], a personal address book, a contacts list, and so on). In general, you should create your distribution lists in the location where you store the majority of your addresses.

Creating a Personal Distribution List

Follow these steps to create a new distribution list in the Contacts folder:

- 1. Click File, New, and then select Distribution List to open a distribution list form, as shown in Figure 18-24.

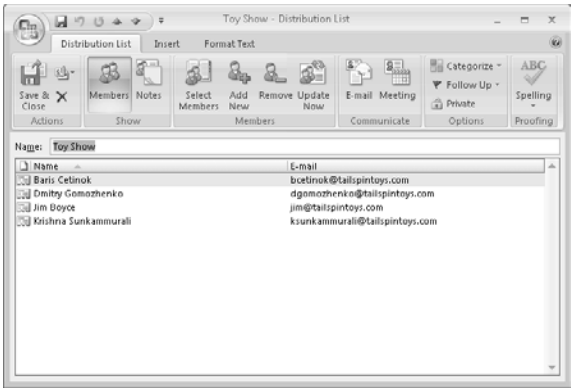


Figure 18-24. Add members to and remove members from a distribution list on the distribution list form.

- 2. Type the name for your distribution list in the Name box. This is the name by which the list will appear in your Contacts folder. If you're creating a distribution list for the marketing department, for example, use the name Marketing.
- 3. In the Members group, click Select Members to open the Select Members dialog box, shown in Figure 18-25.

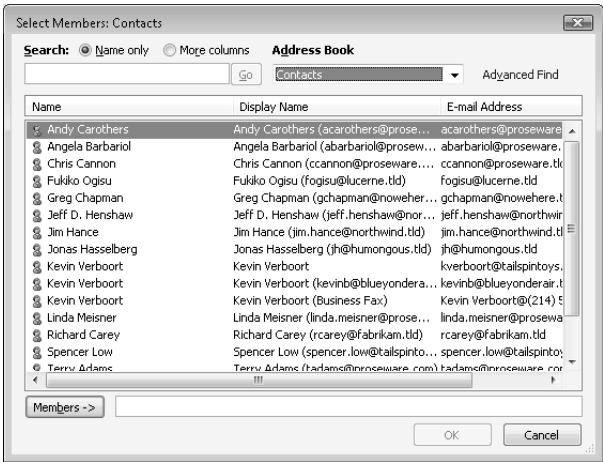


Figure 18-25. Use the Select Members dialog box to select addresses to include in the list.

- 4. In the Address Book drop-down list, select the location from which you want to select addresses (for example, the Global Address List or the Contacts folder).

5. In the Search box, type a name that you want to include, which locates the name in the list, or select the name in the Name list, and then click Members.
6. Repeat steps 4 and 5 to add all addressees to the list, and then click OK when you've finished.
7. If you want to add a longer description of the distribution list, click the Notes button and type the text.
8. Click Save & Close. The new distribution list is added to your contacts list.

Adding or Deleting Names in a Distribution List

You can easily add and delete names in a distribution list. For example, perhaps your department has added a few new employees and you need to add their addresses to the department distribution list.

Follow these steps to add or remove names in a distribution list:

1. In your Contacts folder, open the distribution list to display the distribution list form.
2. Perform one or more of the following actions:
 - To add an address from an address book or a contacts folder, click Select Members.
 - To add an address that is not in a contacts folder or an address book, click Add New.
 - To delete a name, click the name, and then click Remove.
3. Click Save & Close.

INSIDE OUT

Fine-tune distribution lists

You can assign categories to a distribution list, mark it as private, or add notes to it by using the distribution list form. You can also update addresses in a distribution list if their source addresses have changed. For example, if you've changed a colleague's e-mail address in the contact entry and now want to update the corresponding address in the distribution list, you can open the distribution list, select the address, and click Update Now on the distribution list form.

Sharing Contacts

Outlook 2007 lets you share contacts with others by sending vCards through e-mail or by sharing your Contacts folder. The former method lets you share contacts with people who don't use Outlook 2007 or who don't have access to your network or to your Exchange Server. The latter method—sharing your Contacts folder—is a good solution when you need to provide access to contacts for others on your network. This section explains how to share contacts through vCards, offers a brief overview of sharing the Contacts folder, and explains how to share contacts from a public folder.

Note

You can use Windows SharePoint Services (WSS) to share contacts and even integrate those contacts within Outlook 2007. See Chapter 40, "Collaboration with Outlook and Windows SharePoint Services," to learn how to work with and share contacts from a WSS site.

Sharing Your Contacts Folders

If you're running Outlook 2007 with Exchange Server 2000 or later, you can assign permissions to a folder stored in your Exchange Server mailbox to give other users access to that folder. You can grant permissions on a group basis or a per-user basis. Outlook 2007 provides two groups by default—Anonymous and Default—that you can use to assign permissions on a global basis. You also can add individual users to the permissions list and use distribution lists to assign permissions.

Outlook 2007 offers two methods to set permissions on a folder. Here is the easiest method:

1. Open the Folder List, right-click the Contacts folder, and then choose Share Contacts.
2. Outlook 2007 displays a Sharing Invitation message, as shown in Figure 18-26, on the next page.
3. Click To, and then select the people to whom you want to grant access.
4. If you also want to request access to the recipients' calendars, select the Request Permission To View Recipient's Contacts Folder check box.

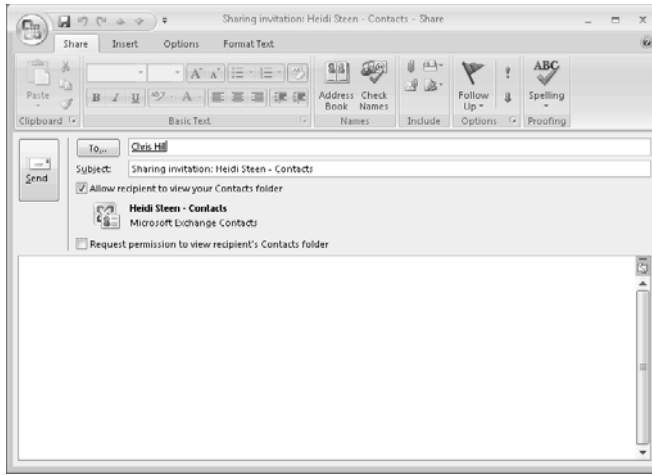


Figure 18-26. You can share your Contacts folder using a simple sharing message.

5. Click Send.
6. Outlook 2007 prompts you to confirm that you want to grant Reviewer (read-only) access to the folder. Click Yes.

The message that the recipients receive informs them that they have been granted access to the folder and can click Open in the message header to open your Contacts folder in Outlook, as shown in Figure 18-27.

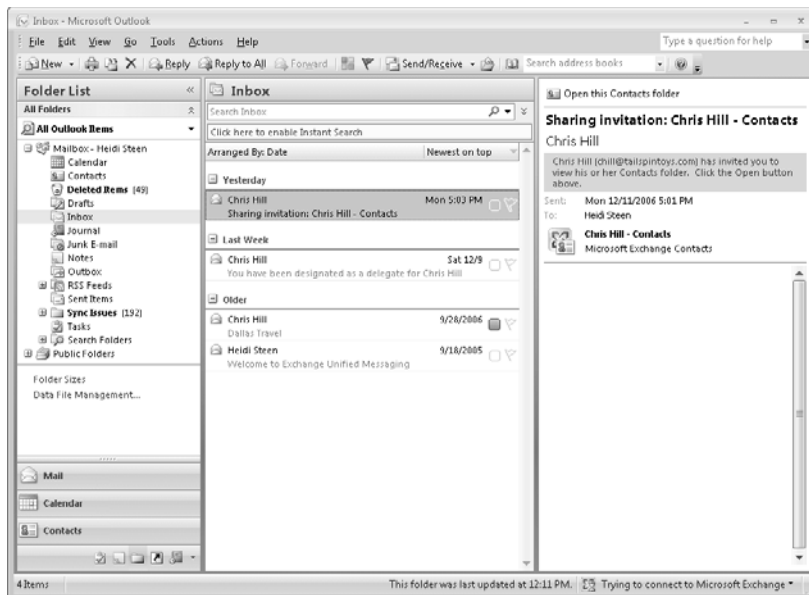


Figure 18-27. Users who receive the sharing message can simply click Open This Contacts Folder in the message header to open the shared folder.

You can also set permissions directly on the folder, which is useful when you want to specify permissions other than Reviewer. Follow these steps to set permissions on your Contacts folder to allow other users access to your contacts:

1. Open the Folder List, right-click the Contacts folder, and then choose Properties on the shortcut menu to display the Contacts Properties dialog box for the folder.
2. Click the Permissions tab, as shown in Figure 18-28.

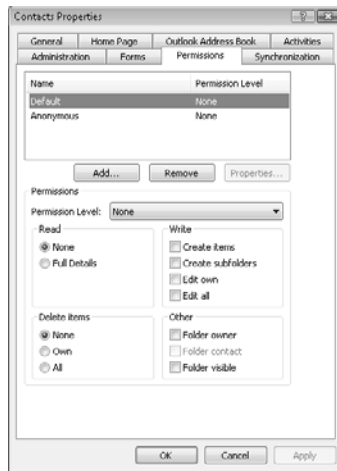


Figure 18-28. Configure permissions on the Permissions tab.

3. Click Add to display the Add Users dialog box.
4. Select the person for whom you want to configure permissions, and then click Add. Click OK to return to the Permissions tab.
5. In the Name box, select the name of the person you just added.
6. In the Permission Level drop-down list, select a level of permission according to the tasks that the user should be able to perform with your Contacts folder. When you select a permission level, Outlook 2007 selects one or more individual permissions in the Permissions area. You also can select or clear individual permissions as needed.
7. Click OK to save the permission changes.

You can grant several permissions for a folder, and you can assign them in any combination you need. See “Sharing Your Calendar” in Chapter 36 to learn more about sharing permissions for Outlook folders.

For a complete explanation of permissions and folder sharing, see “Granting Access to Folders” in Chapter 35.

Sharing Contacts with vCards

A vCard presents contact information as an electronic business card that can be sent through e-mail. vCards are based on an open standard, allowing any application that supports vCards to share contact information. In addition to sending a vCard as an attachment, you also can include it with your message signature.

When you receive a message with a vCard attached, a paper clip icon appears in the Reading Pane to indicate the attached vCard. Use one of the following methods to add the data in the vCard as a contact entry:

- In the Reading Pane, select the paper clip icon, and then click the file name that appears.
- If you've opened the message, right-click the business card icon in the message, and then choose Open.

After you can view the information sent in the vCard, click **Save & Close** to add the information to your contacts list.

Note

You can drag a vCard from a message to your Contacts folder to add the contact information.

Creating a vCard from a Contact Entry

As mentioned earlier, one way to send contact information to someone else is to attach the contact entry to a message as a vCard. You can use this method to share your own contact information or to share one or more other contact entries with another person.

Follow these steps to attach a vCard to a message:

1. In the Contacts folder, select the contact item you want to send as a vCard.
2. Choose **Actions, Send Full Contact, In Internet Format (vCard)**. Outlook 2007 opens a new message form with the contact entry attached as a vCard.
3. Specify an address, complete the message as you would any other, and then click **Send** to send it.

Including a vCard with Your Signature

The second method of sharing a contact is useful when you want to share your own contact information. Rather than attaching it to a message, you can have Outlook 2007 send it along with your message signature. This ensures that the vCard is sent with all outgoing messages.

Note

You can attach text (such as a favorite quote) and graphics to each outgoing message as part of your signature. For complete details on using signatures with Outlook 2007, see “Using Signatures” in Chapter 9.

Follow these steps to add your contact information as a vCard to your message signature:

1. Create your own contact entry if you have not already done so.
2. Click Tools, Options.
3. Click Mail Format and then Signatures.
4. Click New.
5. Enter a name for your signature.
6. Click Business Card.
7. Browse to your own business card, and then click OK.
8. In the Signatures And Stationery dialog box, shown in Figure 18-29, add other information as needed.

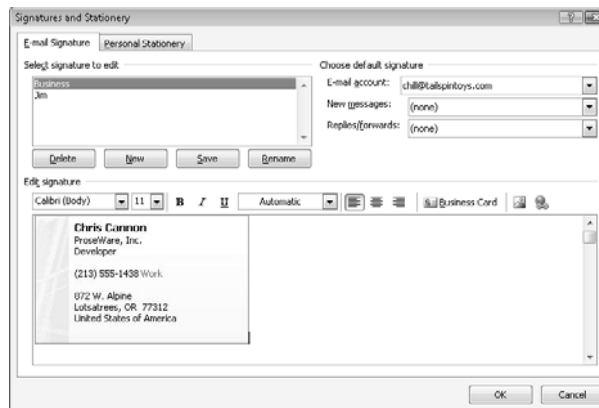


Figure 18-29. Use the Signatures And Stationery dialog box to add text, graphics, and a vCard to your outgoing messages automatically.

9. Click OK twice.

From now on, your contact information will be attached to outgoing messages.

Note

To prevent signatures from being added to your outgoing messages, choose Tools, Options, and then click the Mail Format tab. Select None in the New Messages drop-down list.

Saving a Contact Entry as a vCard

In addition to sending vCards as e-mail attachments, Outlook 2007 allows you to save a contact entry to a file as a vCard. You might do this if you want to link to vCards on a Web site so that others can download the vCards directly rather than receiving a message with the vCards attached. Or perhaps you want to save a large number of contacts as vCards and send them to someone on a Zip disk or other removable media rather than through e-mail.

Follow these steps to save a contact item as a vCard file:

1. Open the contact item that you want to save as a vCard.
2. In Windows Vista™, click the Microsoft Office Button, click Save As, and then click Export To vCard File. In Microsoft Windows XP, click File, Save As. In the Save As type drop-down list, select vCard Files (*.vcf).
3. Type a name in the File Name box, and then click Save.

Saving a vCard Attachment in Your Contacts Folder

When you receive a message containing a vCard attachment, you'll probably want to save the vCard as a contact item in your Contacts folder. Follow these steps to do so:

1. Open the message containing the attached vCard.
2. Double-click the attachment to open it.
3. In the open contact form, click Save & Close. The information in the vCard is saved in your Contacts folder by default.

Setting Contact Options

Outlook 2007 provides several options that control how it stores and displays contacts. To view these options, choose Tools, Options, and then click Contact Options on the

Preferences tab. In the Contact Options dialog box, shown in Figure 18-30, you can configure the following options:

- **Default “Full Name” Order** This option specifies how Outlook 2007 creates the Full Name field when you click Full Name in the new contact form and enter the contact’s first, middle, and last names, along with suffix and title.
- **Default “File As” Order** This option specifies the name that Outlook 2007 uses in the card title. Outlook 2007 uses the information you specify for first, middle, and last name—as well as company—to create the card title based on how this option is set.
- **Check For Duplicate Contacts** Select this check box if you want Outlook 2007 to check for duplicate contacts when you create new contacts.



Figure 18-30. Configure options for contacts in the Contact Options dialog box.

Using Contacts Effectively

Contacts can be a very powerful tool in Outlook 2007. As with any Outlook 2007 feature, you can use them in different ways to suit your needs, and how you use them might not be the most effective way for someone else. However, there are some things you can do to make contacts more useful:

- **Be complete.** The more information you can include for each contact, the more useful your contacts will be. For example, fill in as many of the phone number fields as you can; this will give you more options when using Outlook 2007 to dial a contact.
- **Use categories to your advantage.** Assigning categories to your contacts will help you organize them more effectively—for example, keeping your personal contacts separated from your business contacts.

- **Enter the company name for your business contacts.** Entering the company name in the contact will enable you to group your contacts by company, making it easier not only to locate contacts but also to modify contacts globally when a company change occurs (such as a phone number or company name change).
- **Work from the contact.** If you work in the Contacts folder a lot, keep in mind that you can initiate certain actions from the Contacts folder, such as issuing a new meeting request, assigning a task, creating a new journal entry, or calling the contact. This can save you the trouble of switching to a different folder to initiate these actions.
- **Don't forget the picture.** The capability to add a picture can be very useful. For example, if your organization is growing rapidly or is already large, providing pictures in contacts for employees can help your staff get to know everyone.