



Conquer
Email
Overload

Create Contacts – Your Outlook Database

Creating Contacts is easy in Outlook.

1. From the Contacts folder, click the **New Contact** toolbar button  or **Ctrl+N**.
2. Click inside each field (or tab to each field, or press Enter), and type the appropriate information. You do not have to click Full Name or Address. Clicking inside the field and typing is a better timesaver. (Refer to Outlook Help for more details if needed.)
3. Click the **Save and New** button  as you finish each to start another (add a Category for each Contact as described below). If you need to add another Contact from the same company, click **Actions, New Contact from Same Company**.
4. If you need to close a Contact without saving it, click **File, Close**, and don't save changes. To save and finish, click **Save and Close**.

⇒ *If you want to change how your Contact name is displayed (First Name, Last Name or Last Name, First Name), click **Tools, Options**, on the **Preferences** tab, click **Contact Options**, and choose.*

Categorize Your Contacts

As you update your Contacts, one of the fields you may not have noticed is where you'd add a Category. Adding a Category to each person in your database makes it easy to filter a list later and send messages to people meeting certain criteria.

An example is my Clients category. If I need to send an email message only to them, or produce mailing labels for a special invitation or holiday card, I can filter my Contacts, pulling out just the people in my Clients category, and create customized email

messages, mailing labels, etc., using mail merge (see instructions on creating a mail merge email beginning on page 85).

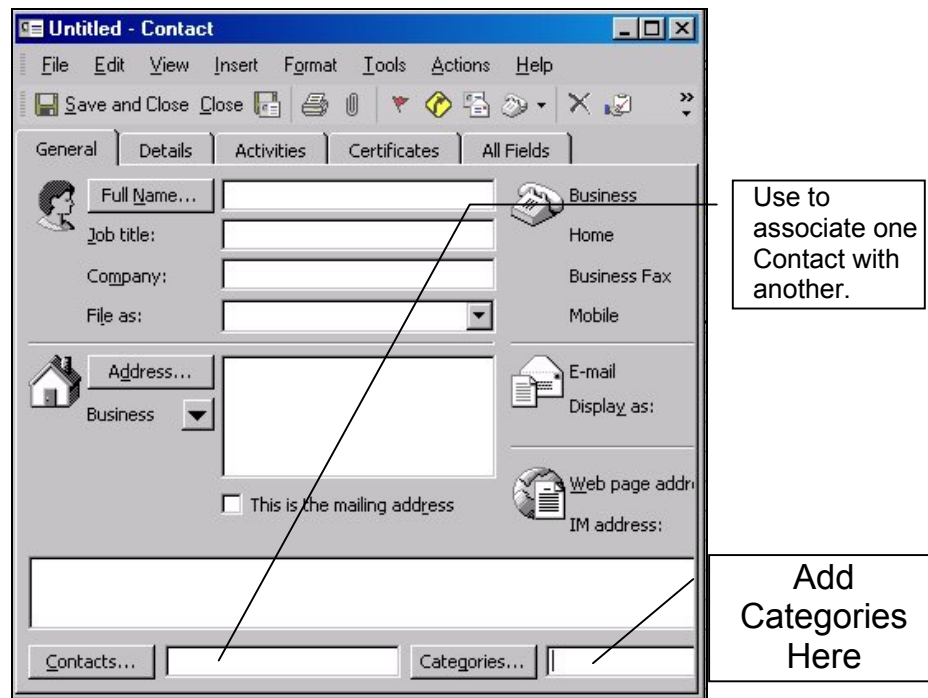


Figure 24. Adding a Category to each Contact makes it easier to filter them later, only mailing to people who fit specific criteria. To the left of the Categories button is Contacts. Click this button, or type the person's name, to associate one contact with another (e.g., an administrative assistant to the manager).

Add Categories to Each Contact

First, take a look at the Categories that come with Outlook by default. Delete the ones you don't need, and add ones you do. Think about all the organizations you belong to, people with similar jobs, and so on.

For new Contacts, add the Categories as you go, making sure you enter the exact category name. For example, you shouldn't

8. Repeat the steps above, but type `^p` in the **Find what box** and **Replace All**. (You're finding all paragraph marks and replacing them with nothing.)
9. Click **No** to checking the remainder of your document.

If you decide not to remove the extra paragraph marks, but need to remove the blank spaces at the beginning and/or end of each line in the text (that occurred when you removed all the >).

10. Select the text you pasted (or press **Ctrl+A** to select the entire document).
11. Press **Ctrl+E** to center the selected text, then press **Ctrl+L** to re-left-align it. All extra spaces will be gone.

Add People to Contacts from Inside a Message

You can add people who send you emails to your Contacts. I do not recommend turning on the feature that does this automatically. Do you really need everyone you send an email to in your database? You'd end up with a lot of email addresses in it, and will have no idea who the people are or why you kept the information in the first place.

But sometimes you will want to add them. Here's how.

1. Right-click on their name or email address on the From line.
2. Click **Add to Contacts**. A Contacts dialog box will open with their name and email address already filled in.
3. Complete information as appropriate, remembering to assign a Category (see page 70).

⇒ *If all you see is a person's name on the From line, and you want to see what their email address is, double-click the name to display Properties.*

Use anagram™ for Contacts / Calendar Appointments

A great timesaver for adding people to your Contacts is anagram™ (www.getanagram.com) software from Textual. If someone's contact information is in the body of an email message, inside a document, or on a Web page, all I do is select the text and click a button. In a flash, anagram adds the information to a New Contact dialog box, putting it all in the right places.

The same thing happens when I select information that resembles meeting information: anagram moves the information to my calendar. This is an incredible product that has saved me a lot of time.

⇒ *If you have a lot of business cards stacked up everywhere, consider buying a business card scanner, scan the cards, then throw them out.*

Open or Save Multiple Attachments

Managing messages with multiple attachments will go faster if you open or save them all at once.

1. To open all messages at once, hold down the **Ctrl** key, and click on any of the attachments you want to open (or click one file, then press **Ctrl+A** to select all of them).
2. Click **File, Open**.

If you want to *save all the attachments*, that's even easier.

1. Without selecting any of the attachments, click **File, Save Attachments, OK**, and save in desired location.

Find Documents in Your Inbox With Attachments

If you ever need to search through messages that have attachments, use Outlook's feature to find all messages with attachments.

1. From the Inbox, click **Tools, Advanced Find**.

Create a Distribution List from Names in a Message

1. (Outlook version 2002 or above) From the email message that has the names you want to copy, select the names, click **Edit, Copy** (or right-click the selected names, click **Copy**).
2. Click **File**, point to **New**, click **Distribution List** (or **Ctrl+Shift+L**).
3. In the **Name** box, give your distribution list a name you'll remember, and click **Select Members**.
4. On the right side of the dialog box, in the list, **Add to distribution list**, right-click anywhere inside the box, and click **Paste**.
5. Click **Save and Close**.

Create a Distribution List with Names from Address Book

1. Click **File**, point to **New**, click **Distribution List**.
2. In the **Name** box, give your distribution list a name you'll remember.
3. Click **Select Members**.
4. In the **Show names from the** drop-down list, click the address book containing the desired email addresses (e.g., **Contacts**).
5. In the **Type Name or Select from List** box, type the name (or first few characters) of the person you want to add to the list. When the name appears in the list below, **double-click** it to move it to the **Add to distribution list** window on the right side.
6. Continue to add desired names, then click **Save and Close**.

Create a Distribution List from Scratch

You may not have the names you want to add to a distribution list already in an email or in your Address Book. You can still create a list (or add people to any of your other distribution lists).


1. Click **File**, point to **New**, click **Distribution List**.
2. In the **Name** box, give your distribution list a name you'll remember, then click the **Add New** button.
3. In the **Add New Member box**, type the person's name and email address. **Repeat Step 4** until you're finished, then click **OK**.

To update information on anyone in a distribution list, open your distribution list, double-click the name, and make desired changes. To delete someone, click their name, then click the **Remove** button (not the Delete toolbar button. If you use the X button, you'll delete your entire list. You'll later find it in your Deleted Items folder).

⇒ *I've created five different media lists using this method. They all begin with NEWS to keep them together when filed away.*

Send Distribution Lists or Contacts to Another User

There may be times when you want to share a distribution list with another user. You can do this by emailing it.

1. From Contacts, either click **Tools, Find**, or click on the Address book icon , or scroll to find the distribution list (or the contact) you want to send. Click it once (or double-click). Then press **Ctrl+F** to send the distribution list or Contact as an email attachment.
2. Complete and send the email message as you normally would.