



*High performance. Delivered.*

## **Working with Outlook 2003: Tips & Tricks**

Sheronda Smith  
21 August 2008

# accenture > Agenda



- Introductions
- Exercise Overview
- Q&A
- Appendix



- Your name
- Your firm
- Your experience with Outlook on a 1 to 5 scale
  - 1: What's that?!
  - 2: I know how to send and write e-mails but what's the other stuff?
  - 3: I can hold my own and hope to learn something new.
  - 4: I get by just fine and figured why not, it's free.
  - 5: I should be teaching this course!



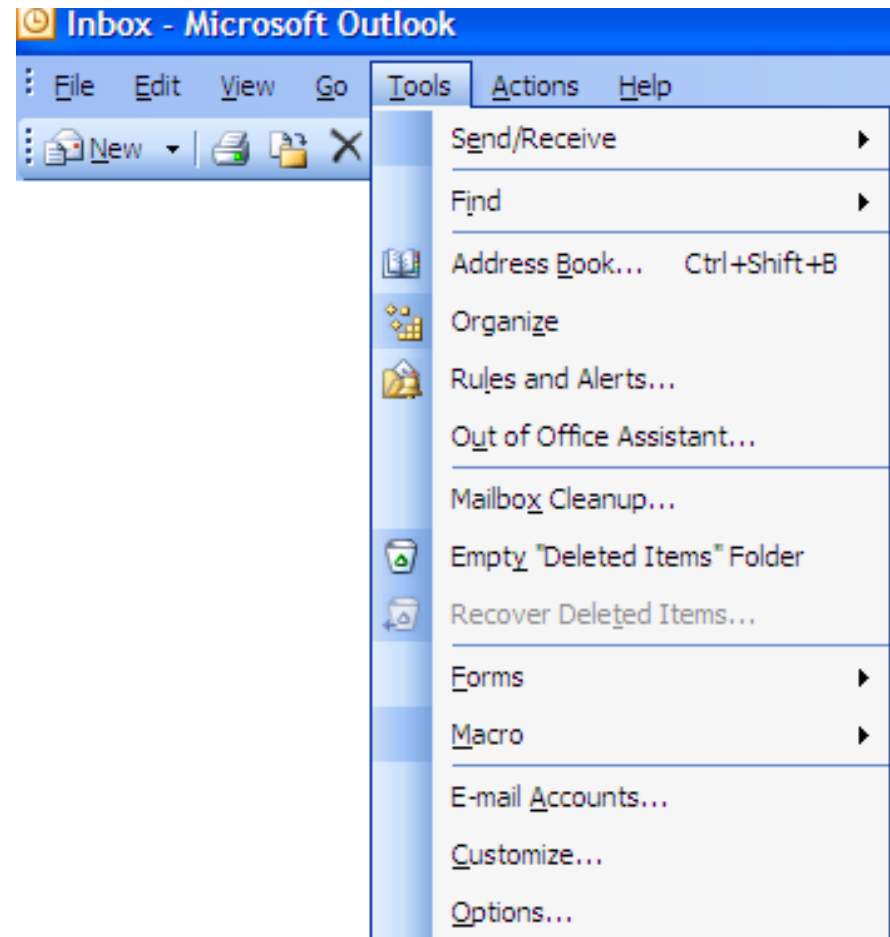
You enjoy shopping and subscribe to your favorite stores for sales promotions. To help prevent your Outlook Inbox from driving you batty, you've decided to learn how to:

- Customize e-mail messages,
- Create folders,
- Find messages,
- File information,
- Flag e-mail messages, and
- Transfer messages to Calendar, Tasks, and Notes

# Customizing Your E-mail: Utilizing the Tools



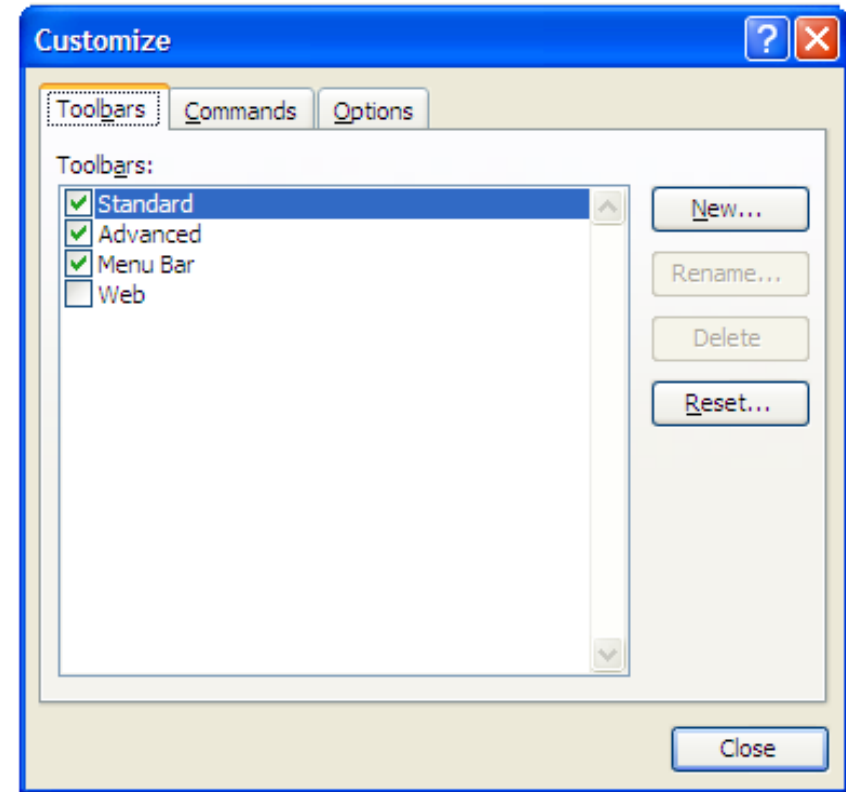
- Advanced Toolbar
- Custom Signatures
- Out of Office Assistant





Allows you to access functions without navigating through the menu bar

1. Select **Customize** from the **Tools** drop down menu
  2. Select the **Toolbars** tab
  3. Check the **Advanced** field
- ☞ Go to **View** on the Menu Bar, select **Toolbars**, and then **Advanced**

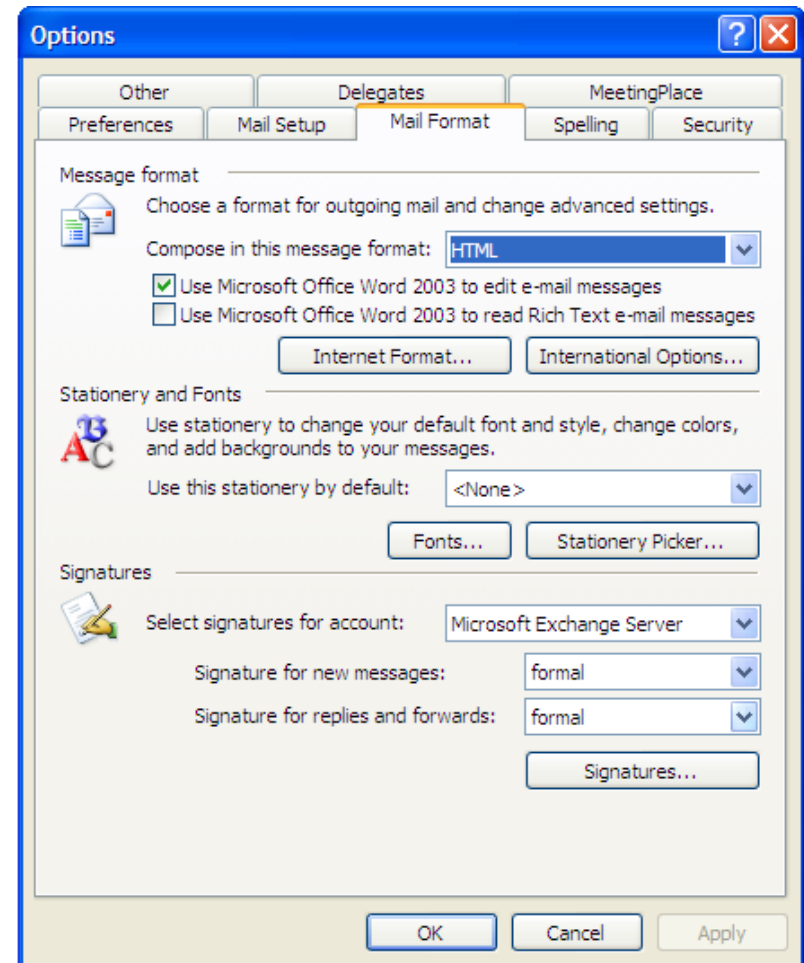


# Customizing Your E-mail: Custom Signature



Adds a personal touch to your e-mails

1. Select **Options** from the Tools drop down menu
2. Select the **Mail Format** tab
3. Click the **Signatures** button to manage or create your signatures
4. Select from your list of signatures for drafting e-mails



# Customizing Your E-mail: Custom Signature



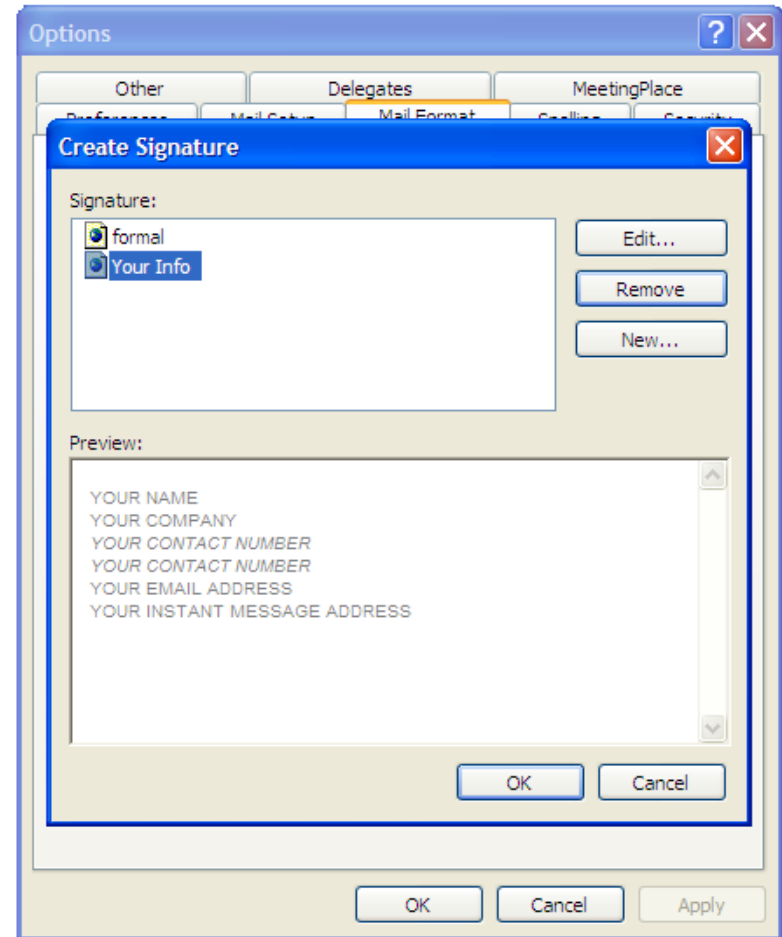
5. Edit, delete, or create new signatures from this window.



Use existing signatures as templates when you select the New button.




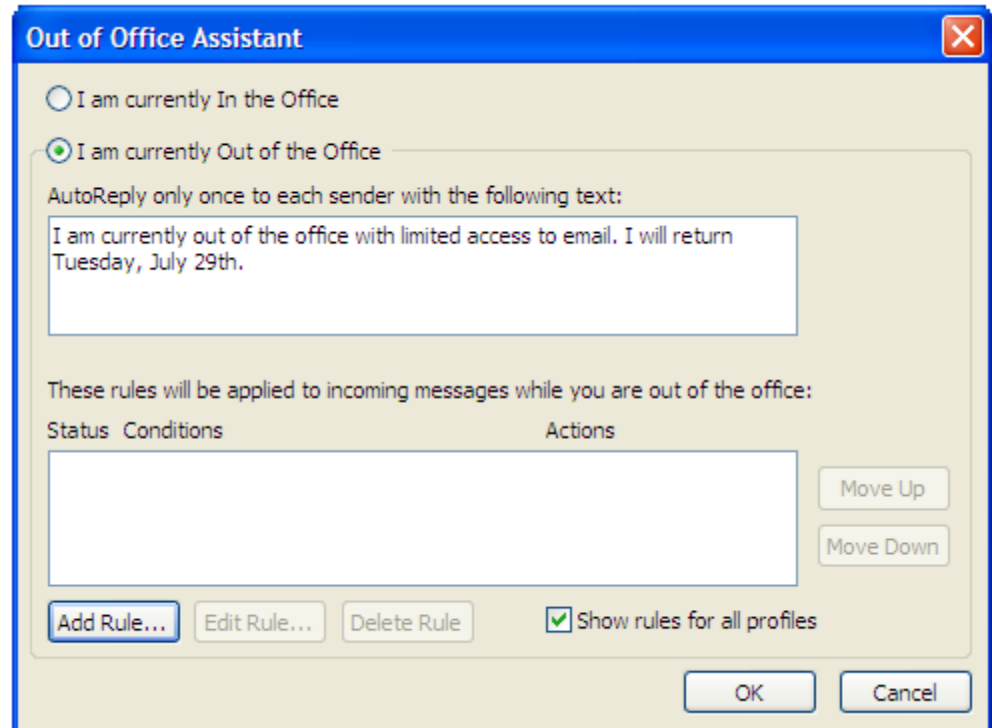
You can change signatures within an e-mail draft.





Alert senders of your unavailability.

1. Select **Out of Office Assistant** from the **Tools** drop down menu.
  2. Tap the appropriate button.
  3. Scribe your AutoReply message to senders.
-  Remember to turn off the **Out of Office Assistance** when you return.



**Out of Office Assistant**

I am currently In the Office  
 I am currently Out of the Office

AutoReply only once to each sender with the following text:

I am currently out of the office with limited access to email. I will return Tuesday, July 29th.

These rules will be applied to incoming messages while you are out of the office:

Status	Conditions	Actions

Show rules for all profiles

# accenture <sup>></sup> Getting Organized



- Create folders
- Find messages
- File information
- Flag e-mail messages

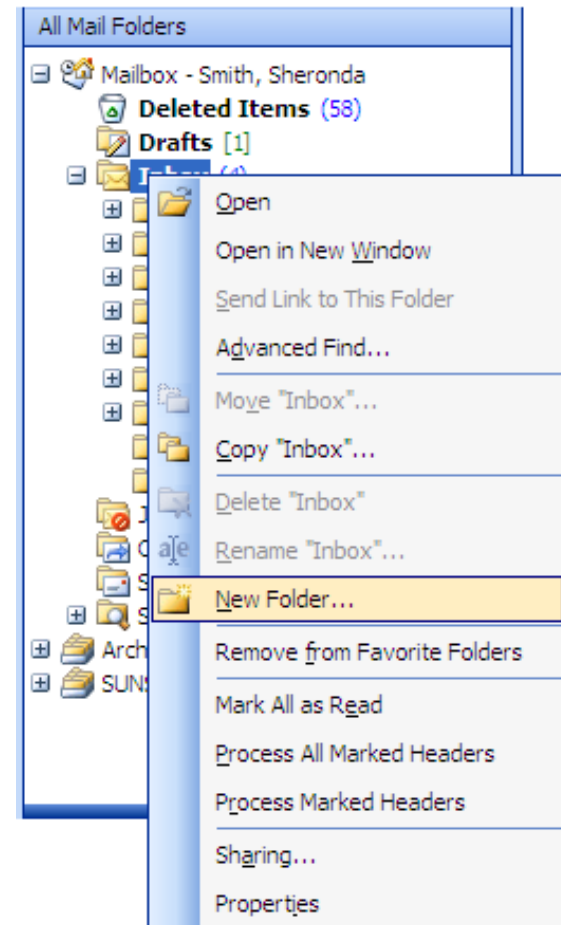


# Creating Folders in Folder List



- Use the mouse key or menu bar
- Window appears for typing folder name and selecting its location
- ☞ To modify folder after creating, just select folder and click right mouse button for options:
  - Move
  - Copy
  - Delete
  - Rename
  - Move to Favorites Folder

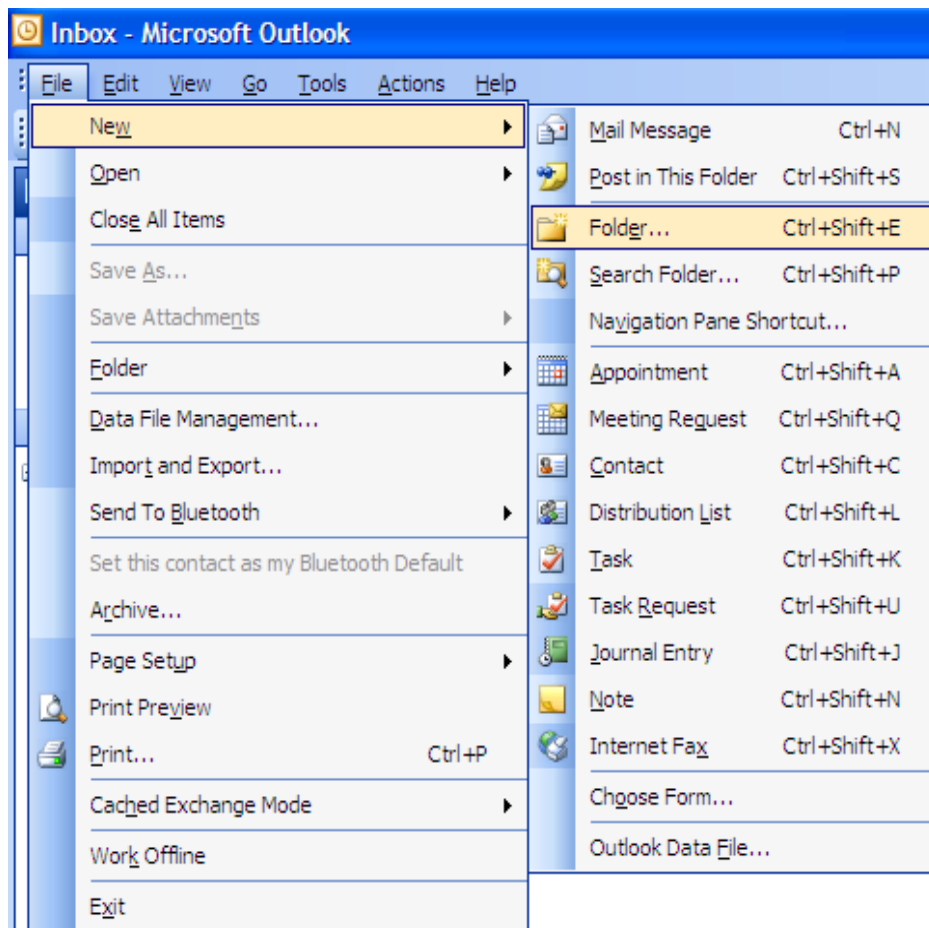
## *New Folder using mouse key*



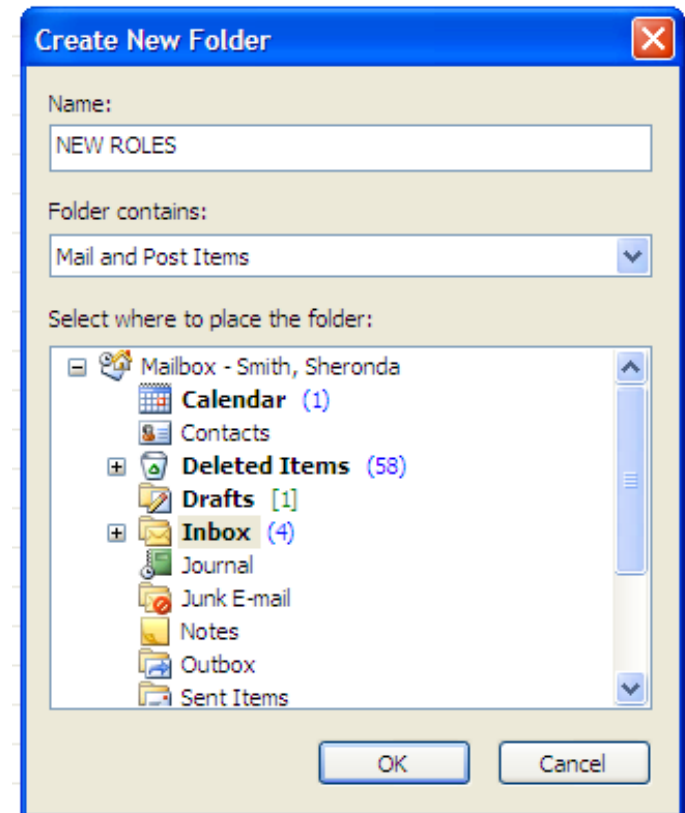
# Creating Folders in Folder List



## *New Folder from menu bar*



## *Prompt for folder name and location*



# Finding Information: Performing Search



SUNSHINE - Microsoft Outlook

File Edit View Go Tools Actions Help

New Reply Reply to All Forward Send/Receive Find Type a contact to find Back Messages

Look for: SPIEGEL Search In: SUNSHINE Find Now Clear Options

**Enter search word(s)**

**SUNSHINE**

From	Received	Size
Spiegel	Tue 6/10/2008 1:06 AM	1...
Spiegel	Sun 6/8/2008 1:05 AM	1...
Spiegel sdsmith@gmx.net	Sat 6/7/2008 9:07 AM	1...

97 Items

start iTunes SUNSHINE - Microsof... D:\Documents and S... Outlook Tricks and Ti... Out of Office.bmp - ... Clip Art Download - ... 11:44 AM

# Finding Information: Group by Box



SUNSHINE - Microsoft Outlook

File Edit View Go Tools Actions Help

New Reply Reply to All Forward Send/Receive Find Type a contact to find Back Messages

Look for: Search In: SUNSHINE Find Now Clear Options

**Click on Group Box icon**

**Mail**

Favorite Folders

- Inbox (9)
- Unread Mail (13)
- For Follow Up (4)
- Sent Items

All Mail Folders

- Mailbox - Smith, Sheronda
- Archive Folders
- SUNSHINE
- Deleted Items (13)
- Drafts
- Inbox (21)
- Junk E-mail
- Outbox
- Sent Items
- Search Folders

97 Items

**SUNSHINE**

From: Barnes & Noble (7 items)

From	Subject	Received	Size
sdsmith@gmx.net	Limited Time Offer -- Two Free Gifts	Sat 8/16/2008 5:28 AM	14...
sdsmith@gmx.net	15% Off Coupon Inside	Thu 8/7/2008 1:45 PM	13...
sdsmith@gmx.net	New J. K. Rowling Book Available for Pre-Order	Fri 8/1/2008 2:41 AM	12...
sdsmith@gmx.net	This Week -- Coupons, 4 Days Until Breaking Dawn, New B&N Recommends Pick, More	Tue 7/29/2008 2:24 PM	37...
sdsmith@gmx.net	This Week -- Reader Favorites, Paperback Sale, Breaking Dawn Parties, More	Tue 7/15/2008 2:13 PM	42...
sdsmith@gmx.net	15% Off Coupon Inside	Fri 7/11/2008 1:36 AM	14...
sdsmith@gmx.net	This Week -- Coupons, Nora Roberts, Stephanie Meyer, Clearance Sale, More	Tue 7/8/2008 2:05 PM	38...

From: Carol's Daughter (8 items)

sdsmith@gmx.net	They sold out on HSN, but we have them here! See details.....	Mon 8/11/2008 8:34 PM	17...
sdsmith@gmx.net	Shop the faves that sold out on HSN!	Sun 8/3/2008 1:13 PM	18...
sdsmith@gmx.net	Refresh your summer beauty from head-to-toe!	Wed 7/30/2008 12:28 PM	15...
sdsmith@gmx.net	Final Chance to Win a Trip to Jamaica!	Thu 7/24/2008 9:37 PM	11...
sdsmith@gmx.net	Vote for Almond Cookie Sea Salt Scrub!   Complimentary Shipping Offer!	Wed 7/23/2008 1:00 PM	15...
sdsmith@gmx.net	New Summer Faves for Sunny Days!   Free Shipping	Thu 7/17/2008 3:17 PM	14...
sdsmith@gmx.net	Limited Edition New Summer Fragrances! Spritz a Fresh Scent!	Tue 7/15/2008 1:33 PM	14...
sdsmith@gmx.net	Carol's Daughter is coming to a Macy's Store near your.	Mon 7/14/2008 7:39 PM	14...

From: Cherry Moon Farms (5 items)

Sheronda	Sheronda, Celebrate Summer with 50% More Fruit FREE!	Mon 8/11/2008 5:58 AM	33...
Sheronda	Sheronda, Introducing Sweet Deals on Summer Fruit!	Mon 8/4/2008 5:36 AM	29...
Sheronda	Sheronda, Friday is Your Last Chance to Send Lapin Cherries!	Wed 7/30/2008 5:07 AM	12...
Sheronda	Sheronda, Friday is Your Last Chance to Send Lapin Cherries!	Mon 7/28/2008 5:34 AM	30...
Sheronda	Hurry, Sheronda! Last Chance to Send Bing Cherries is Friday!	Wed 7/16/2008 5:13 AM	12...

From: Christianity Today Daily Newsletter (17 items)

sdsmith@gmx.net	CTDirect - Review: Kingdom of Comfort	Mon 8/18/2008 4:09 PM	66...
sdsmith@gmx.net	CTDirect: Bible Translation Debate in Jamaica	Thu 8/14/2008 1:06 PM	59...

start iTunes SUNSHINE - Microsof... D:\Documents and S... Outlook Tricks and Ti... Perform Search.bmp ... Clip Art Download - ... 11:50 AM

# Finding Information: Sort by From (Sender)



SUNSHINE - Microsoft Outlook

File Edit View Go Tools Actions Help

Look for: Search In: SUNSHINE Find Now Clear Options

Mail

Favorite Folders

- Inbox (9)
- Unread Mail (13)
- For Follow Up [4]
- Sent Items

All Mail Folders

- Mailbox - Smith, Sheronda
- Archive Folders
- SUNSHINE
- Deleted Items (13)
- Drafts
- Inbox (21)
- Junk E-mail
- Outbox
- Sent Items
- Search Folders

Mail

Calendar

Contacts

Tasks

97 Items

From	To	Subject	Received	Size
Aerosoles Offers	sdsmit@...	Get sporty and save	Sat 8/16/2008 8:10 AM	1...
Aerosoles Offers	sdsmit@gmx.net	Season's newest casuals - 20% off	Thu 8/14/2008 3:07 PM	1...
Aerosoles Offers	sdsmit@...		Sat 8/9/2008 8:07 AM	1...
Aerosoles Offers	sdsmit@...		Thu 8/7/2008 12:07 PM	1...
Aerosoles Offers	sdsmit@...		Sat 8/2/2008 8:17 AM	1...
Aerosoles Offers	sdsmit@gmx.net	Summer Clearance - hot summer sandals	Sat 7/12/2008 8:12 AM	1...
Aerosoles Offers	sdsmit@gmx.net	End-of-Season Clearance - get great summer sandals	Tue 7/8/2008 12:33 PM	1...
Ann Taylor	sdsmit@gmx.net	4 Days Only: Buy One Sale Item, Get One 50% OFF	Fri 7/25/2008 7:06 AM	1...
Ann Taylor	sdsmit@gmx.net	Up to 40% OFF Summer Tops ends Wednesday!	Tue 7/15/2008 5:08 AM	1...
Ann Taylor	sdsmit@gmx.net	Up to 70% OFF + an Exclusive Online Offer!	Thu 7/10/2008 5:56 PM	1...
Ann Taylor LOFT	sdsmit@gmx.net	Online Only This Weekend: Buy One Sale Item, Get One 50% OFF!	Fri 7/25/2008 2:34 PM	1...
Ann Taylor LOFT	sdsmit@gmx.net	ALL SALE ITEMS; Buy One Get One 50% OFF!	Tue 7/22/2008 7:22 AM	1...
Ann Taylor LOFT	sdsmit@gmx.net	2 Days Only: \$15 OFF Pants, Denim & Capri	Tue 7/15/2008 7:36 AM	1...
Bare Escentuals	SHERONDA SMITH	New, deliciously decadent, 100% Natural Lipcolors	Mon 8/11/2008 6:48 PM	2...
Bare Escentuals	SHERONDA SMITH	A collection to buzz about	Tue 8/5/2008 8:14 PM	1...
Bare Escentuals	SHERONDA SMITH	New fall collection at Bare Escentuals	Fri 8/1/2008 1:02 PM	2...
Bare Escentuals	SHERONDA SMITH	Party with the girls and bareMinerals	Fri 7/25/2008 5:34 AM	1...
Bare Escentuals	SHERONDA SMITH	Coming Soon: Bare Escentuals at Mall of Georgia	Wed 7/23/2008 10:53 PM	1...
Bare Escentuals	SHERONDA SMITH	Big Lips. Big Lashes. Bigger Flirt.	Fri 7/11/2008 2:09 PM	2...
Barnes & Noble	sdsmit@gmx.net	Limited Time Offer -- Two Free Gifts	Sat 8/16/2008 5:28 AM	1...
Barnes & Noble	sdsmit@gmx.net	15% Off Coupon Inside	Thu 8/7/2008 1:45 PM	1...
Barnes & Noble	sdsmit@gmx.net	New J. K. Rowling Book Available for Pre-Order	Fri 8/1/2008 2:41 AM	1...
Barnes & Noble	sdsmit@gmx.net	This Week -- Coupons, 4 Days Until Breaking Dawn, New B&N Recommends Pick, More	Tue 7/29/2008 2:24 PM	3...
Barnes & Noble	sdsmit@gmx.net	This Week -- Reader Favorites, Paperback Sale, Breaking Dawn Parties, More	Tue 7/15/2008 2:13 PM	4...
Barnes & Noble	sdsmit@gmx.net	15% Off Coupon Inside	Fri 7/11/2008 1:36 AM	1...
Barnes & Noble	sdsmit@gmx.net	This Week -- Coupons, Nora Roberts, Stephanie Meyer, Clearance Sale, More	Tue 7/8/2008 2:05 PM	3...
Carol's Daughter	sdsmit@gmx.net	They sold out on HSN, but we have them here! See details.....	Mon 8/11/2008 8:34 PM	1...
Carol's Daughter	sdsmit@gmx.net	Shop the faves that sold out on HSN!	Sun 8/3/2008 1:13 PM	1...
Carol's Daughter	sdsmit@gmx.net	Refresh your summer beauty from head-to-toe!	Wed 7/30/2008 12:28 PM	1...
Carol's Daughter	sdsmit@gmx.net	Final Chance to Win a Trip to Jamaica!	Thu 7/24/2008 9:37 PM	1...
Carol's Daughter	sdsmit@gmx.net	Vote for Almond Cookie Sea Salt Scrub!   Complimentary Shipping Offer!	Wed 7/23/2008 1:00 PM	1...

Click on From column header



Tells Outlook how to sort your incoming e-mail messages into folders.

1. Select e-mail.
2. Using the right mouse button to select **Create Rule** from drop down menu



Go to **Tools** on the menu bar and select **Organize** to

- Move messages
- Use color codes
- Change folder views

# File Information: Create Rule



SUNSHINE - Microsoft Outlook

File Edit View Go Tools Actions Help

New Reply Reply to All Send/Receive Back Messages

Look for: Search In: SUNSHINE Find Now Clear Options

**Mail**

Favorite Folders

- Inbox (9)
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- Mailbox - Smith, Sheronda
- Archive Folders
- SUNSHINE
  - Deleted Items (13)
  - Drafts
  - Inbox (21)

**Mail**

Calendar

Contacts

Tasks

97 Items

**SUNSHINE**

From	To	Subject	Received	S...
Aerosoles ...	sdsmith@gmx....	Get sporty and save	Sat 8/16/2008 8:1...	1..
Aerosoles ...	sdsmith@gmx....	Season's newest casuals - 20% off	Thu 8/14/2008 3:...	1..
Aerosoles ...	sdsmith@gmx....	Subj: Endless style, classy looks + shop our summe...	Sat 8/9/2008 8:07...	1..
Aerosoles ...	sdsmith@gmx....	A special offer on our popular style	12:...	1..
Aerosoles ...	sdsmith@gmx....	5 Days Left, Fall Pre Sale - 20% off our	8:17...	1..
Aerosoles ...	sdsmith@gmx....	Summer Clearance - hot summer sanda	8 8:1...	1..
Aerosoles ...	sdsmith@gmx....	End-of-Season Clearance - get great s	12:...	1..
Ann Taylor	sdsmith@gmx....	4 Days Only: Buy One Sale Item, Get C	7:0...	1..
Ann Taylor	sdsmith@gmx....	Up to 40% OFF Summer Tops ends We	8 5:...	1..
Ann Taylor	sdsmith@gmx....	Up to 70% OFF + an Exclusive Online C	8 5:...	1..
Ann Taylor ...	sdsmith@gmx....	Online Only This Weekend: Buy One Sa	2:3...	1..
Ann Taylor ...	sdsmith@gmx....	ALL SALE ITEMS: Buy One Get One 50%	8 7:...	1..
Ann Taylor ...	sdsmith@gmx....	2 Days Only: \$15 OFF Pants, Denim & C	8 7:...	1..
Bare Escen...	SHERONDA SM...	New, deliciously decadent, 100% Natu	8 6:...	2..
Bare Escen...	SHERONDA SM...	A collection to buzz about	8:1...	1..
Bare Escen...	SHERONDA SM...	New fall collection at Bare Escentuals	1:02 ...	2..
Bare Escen...	SHERONDA SM...	Party with the girls and bareMinerals	5:3...	1..

Open

Print

Reply

Reply to All

Forward

Follow Up

Mark as Unread

Categories...

Find All

Create Rule...

Junk E-mail

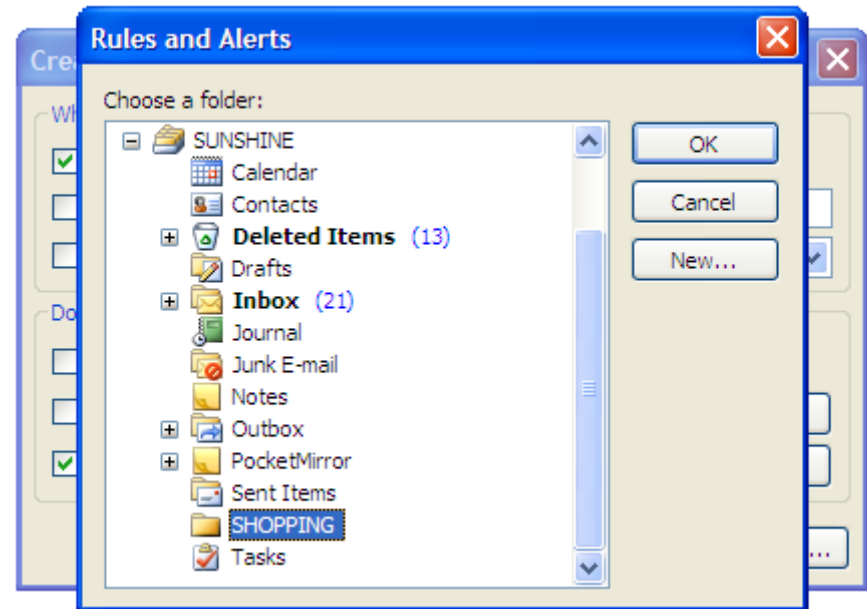
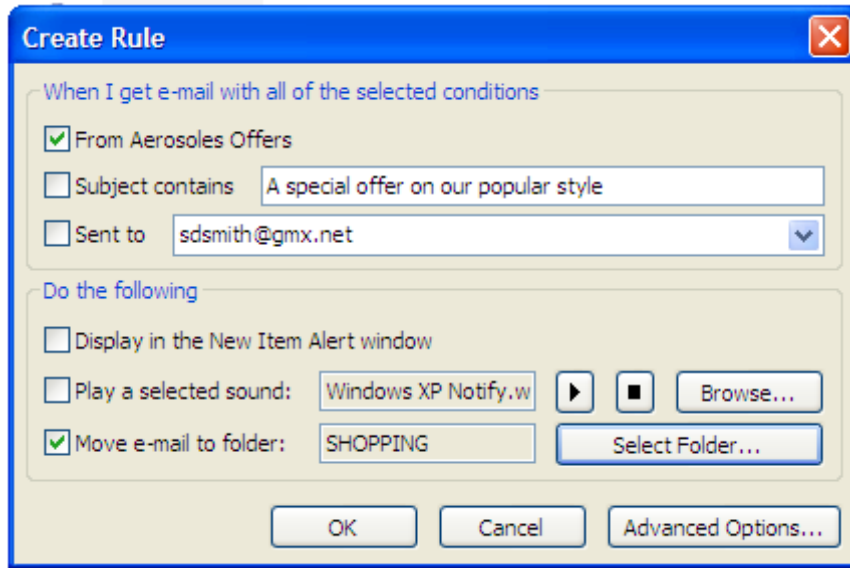
Delete

Move to Folder...

Options...




# File Information: Create Rule

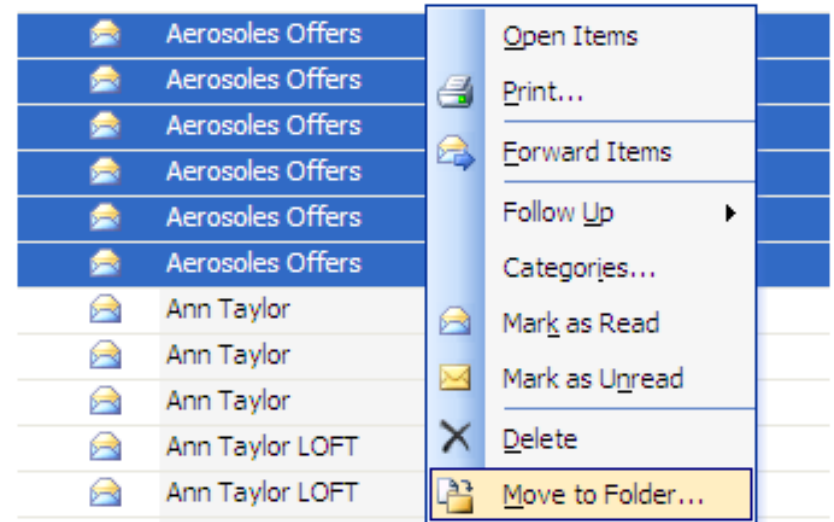




Allows you to move messages via the mouse button drop down menu.

1. Select message(s)
2. Click right mouse button.
3. Select **Move to Folder** from drop down menu.
4. Indicate location for the message(s).

 Remember you can go to **Edit** in the menu bar to select **Move to Folder** and **Undo Move**.



# accenture <sup>></sup> Flagging Messages




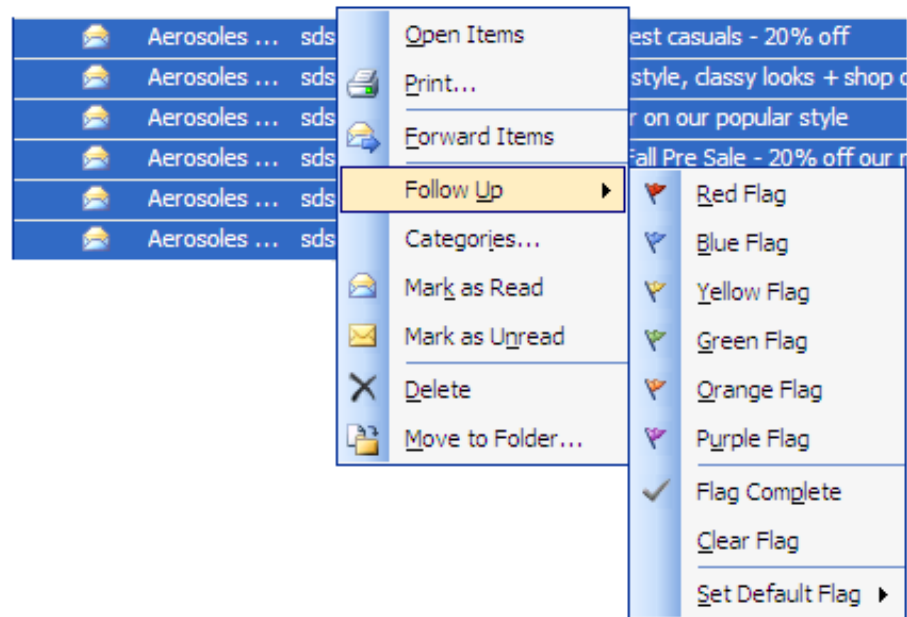
- Outlook allows you to flag e-mail messages so you can
  - Prioritize
  - Schedule
  - Track follow-up actions
  - Set-up reminders for yourself

# accenture <sup>></sup> Flagging Messages



1. Select one or more messages
2. From the Menu Bar select Actions and then Follow Up to select your flag
3. OR Use the right mouse button to select Follow Up from the drop down menu

 Within your Mail dashboard you can see a listing of all your flagged e-mails by selecting For Follow Up within the Favorite Folder



*Note:* When selecting only one message you will see the **Add Reminder** button after **Flag Complete** in the menu



Use the Drag and Drop technique

1. Highlight message.
2. Drag message to icon for **Calendar, Task** or **Note** in the **Folder List**.
3. Notice that e-mail message is embedded in the body of the window.
4. Modify window fields as you see fit.





Different techniques for selecting Outlook messages:

- **Select all the messages in a folder**
  - Depress Ctrl+A
  - OR go to Edit in Menu Bar to click on Select All
- **Select messages in series**
  - Identify messages that are one after the other
  - Select the first message
  - Depress Shift key while simultaneously clicking on the last message in your range
- **Select messages in random order**
  - Identify messages that may not be in series
  - Select the first message
  - Depress the Ctrl while simultaneously clicking messages



*Note:* This feature requires you to be using a Microsoft Exchange Server e-mail account.

1. In the message, click **Options**.
2. Select the **Use voting buttons** check box, and then click the voting button names you want to use in the box. To create your own voting button names, delete the default button names, and then type any text you want. Separate the button names with semicolons.
3. Under **Delivery options**, select the **Save sent message to** check box. To select a folder other than the **Sent Items** folder, click **Browse**.
4. Click **Close**, and then click **Send**.



5. Review tracking results and voting responses
6. Open the original message you are tracking. This message is usually located in the **Sent Items** folder.
7. Click the **Tracking** tab.

# accenture <sup>></sup> Appendix: Using Help



Don't be afraid to use Help to get your question answered or to learn a new feature!

