

Technology Workshop Get more from Microsoft Outlook!

July 17, 2013

Microsoft®
Small Business
Specialist

Microsoft
CERTIFIED
Partner



Welcome!

- Thank you for joining us today.
- In today's call we will cover a few tips and tricks to help you get more productive with your computer. We'll wrap up by 1pm.
- If you want to follow from your office, go to www.ekaru.com / Go to "What's New" near the bottom of the page. Presentation will open in a browser, click the down arrow in nav bar to advance slides.

Format

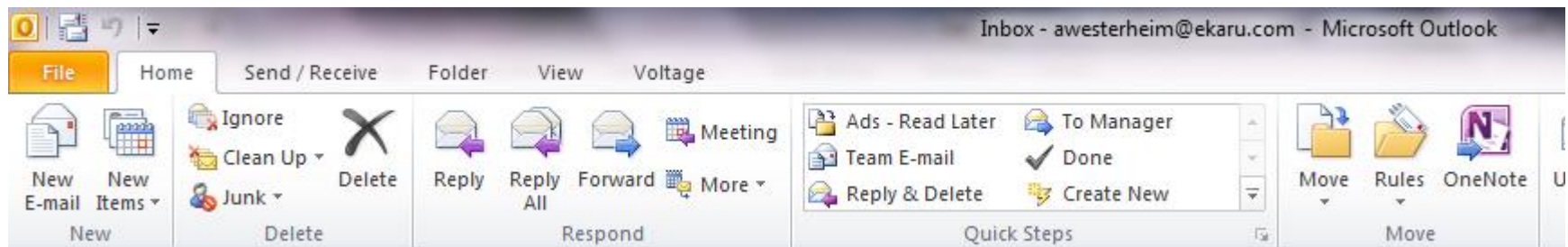
- Given the number of people on the line today, this is a “listen only” call.
 - (Reason, cut down on ambient noise, avoid “call on hold music” – a bit tough though, because I can’t hear you!)
- If you have questions, please eMail to knoran@ekaru.com and we will try to include Q&A at the end of the call – we will be reviewing email live during the call.
- Call 978-692-4200 for help.

Workshop Mission

- Help you get more from the technology you already have.
- Introduce you to new technologies you need to know about.

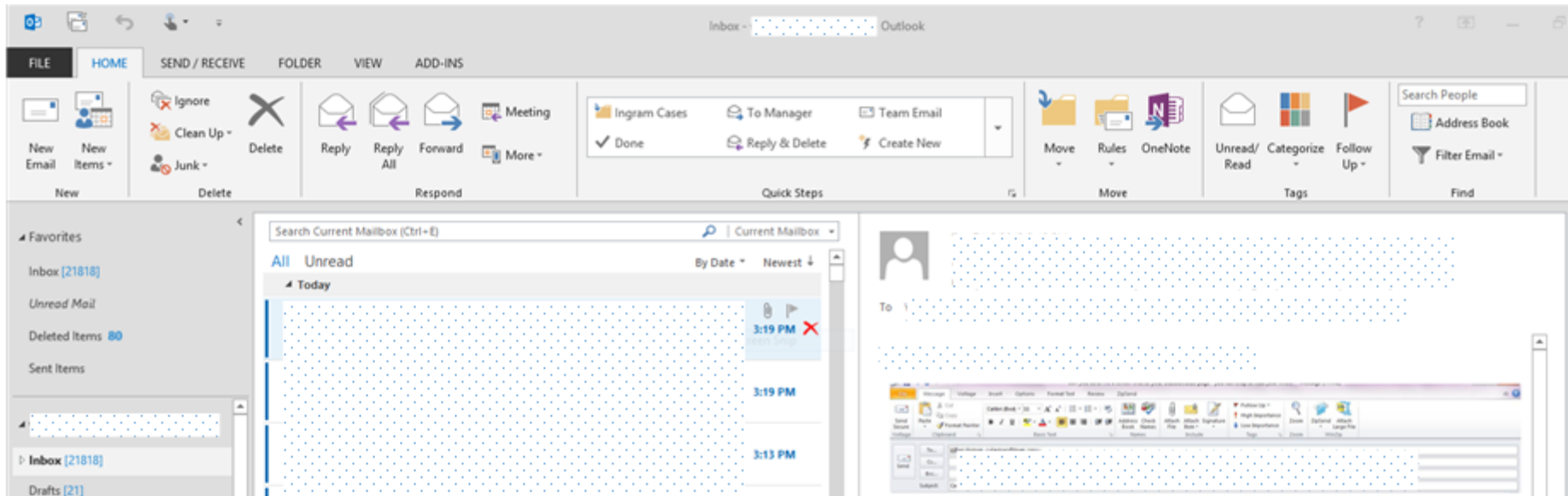
Outlook Versions

- All examples today are Outlook 2010
- Older versions are “theme and variation” of the same concepts.
- PST file is now in “Documents”
- Outlook 2010 has “ribbon” navigation:



Outlook 2013


- Evolution from Outlook 2010 – “Ribbon” – similar, but takes some “getting used to”



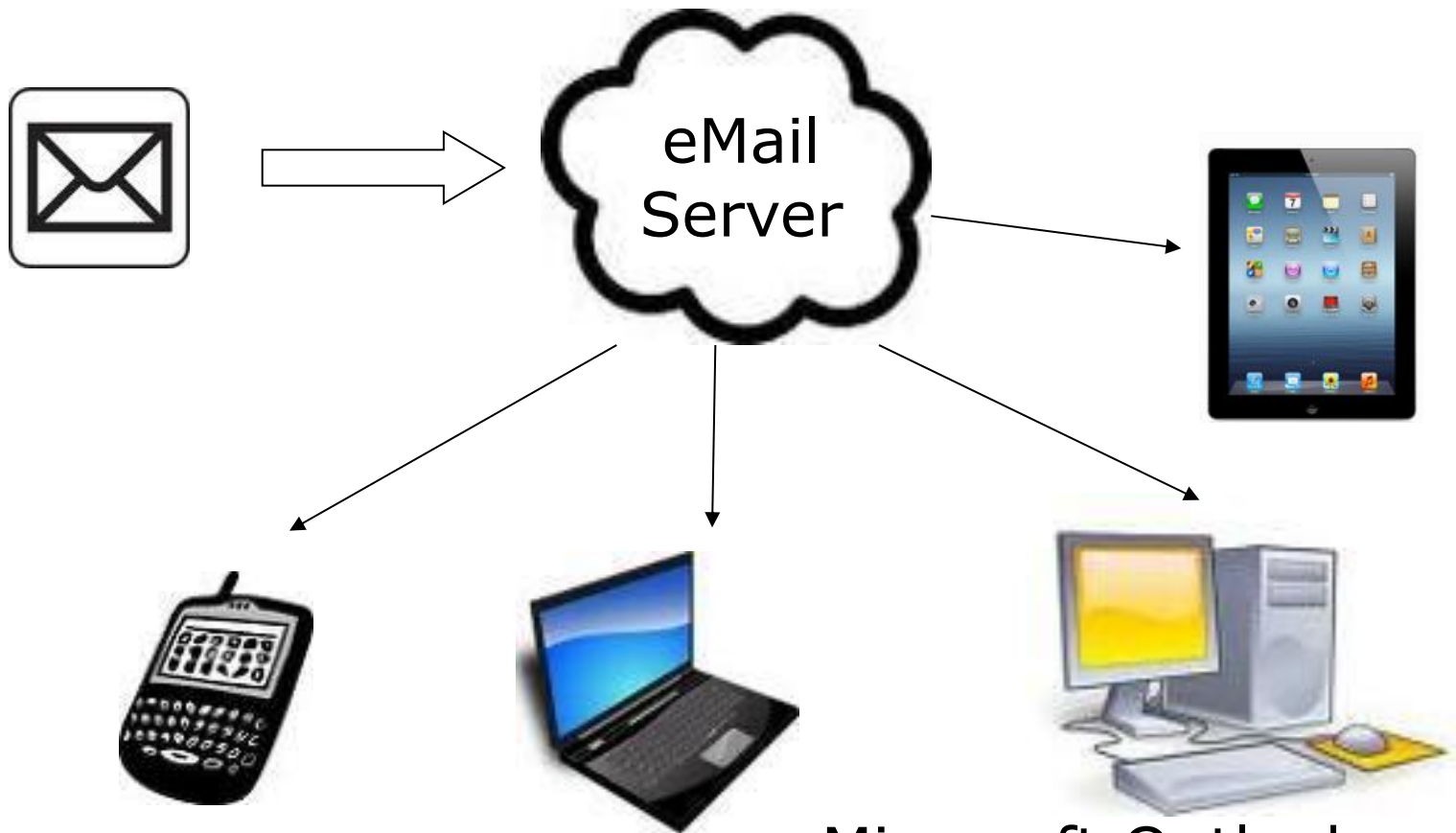
Versions?

- Many clients are still ordering Office 2010 – (Not available through retail)
- CHECK compatibility of 2013 with your industry-specific applications.
- REMINDER – Windows XP support will end in April 2014 – start planning now.

Microsoft Outlook

- eMail 
 - Contacts
 - Tasks
 - Calendar
-
- In today's workshop, we'll cover a few tips and tricks that we hope will get you more organized!

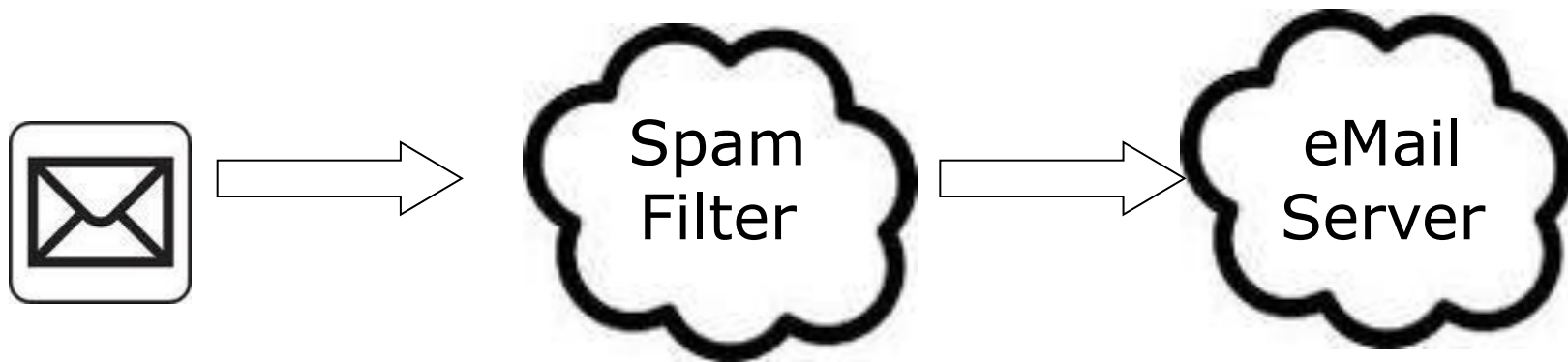
Where is your mail?



- Microsoft Outlook
- WebMail



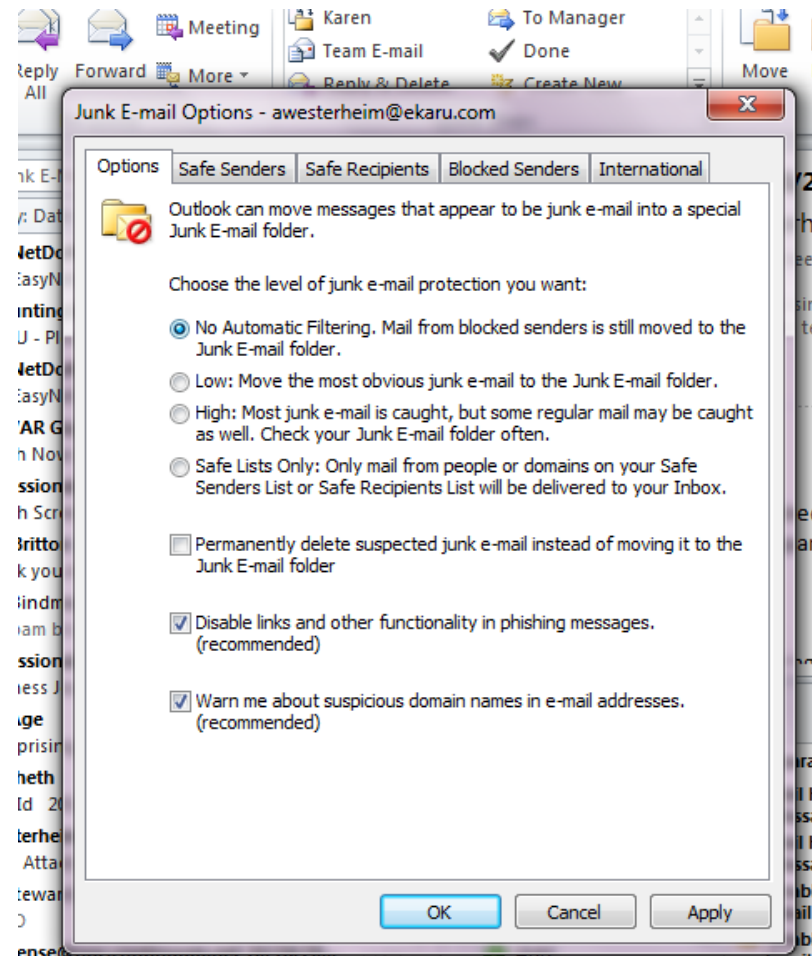
Clear the clutter! – Spam!



- Filter Spam BEFORE it gets to your mail server!
- For some customers, filtering 30,000 spam messages a month! – **90% of total email volume**
- First step to organization is to control spam!

Use ONE Junk Filter

- Turn off your Outlook Junk filter if you use another tool.
- Watch out – Re-install Office may re-set the settings.
- We recommend NOT using Outlook Junk and instead using “Cloud” filtering.



Strategy: Mail, Calendars, and Contacts in multiple places – Synchronization (sync)

- Multiple ways to configure this
- Most simple – “Pop” mail to main location (office computer) and read new mail by other methods (web, blackberry, iPhone)
- MANY options – full synchronization, Blackberry Enterprise Server, Exchange Server....
- Think of what you NEED, then develop the strategy.

Synchronization - Exchange

- Exchange Mail
 - Local – Server on site
 - Cloud (“hosted”)
 - Mix and match regular and Exchange hosted mailboxes
 - Solution is fully designed for synchronization.

Synchronization

- Webmail Sync:
 - Synchronize Webmail, Contacts, Calendars with a smart phone.
 - Does NOT synchronize with Outlook.
 - *Not recommended except for webmail only users.*

Synchronization

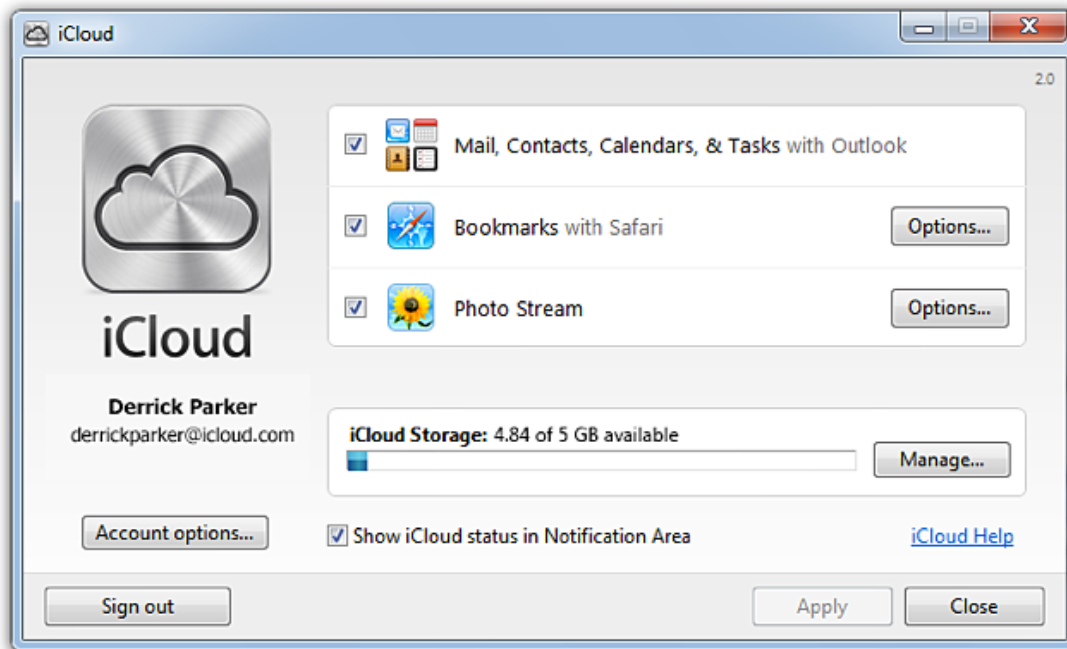
■ Desktop Application - Blackberry



Synchronization - iPhone

■ Support.apple.com

iCloud Control Panel for Windows v2.0



Download

Version: 2.0

Post Date: September 19, 2012

Download ID: DL1455

File Size: 45.24 MB

System Requirements

Microsoft Windows Windows Vista

SP2 or Windows 7

Safari 5.1.7 or Internet Explorer 9 or later (for bookmarks)

Microsoft Outlook 2007, 2010 or an up-to-date browser (for Mail, Contacts, Calendars)

Broadband Internet access

Supported Languages

Deutsch, English, Français, 日本語, Español, Italiano, Nederlands, Dansk, Norsk Bokmål, Polski, Português, Português Brasileiro, Русский, Suomi, Svensk, 简体中文, 繁體中文, 한국어, Bahasa Indonesia, British English, Crna

Droid – Syncdroid.net

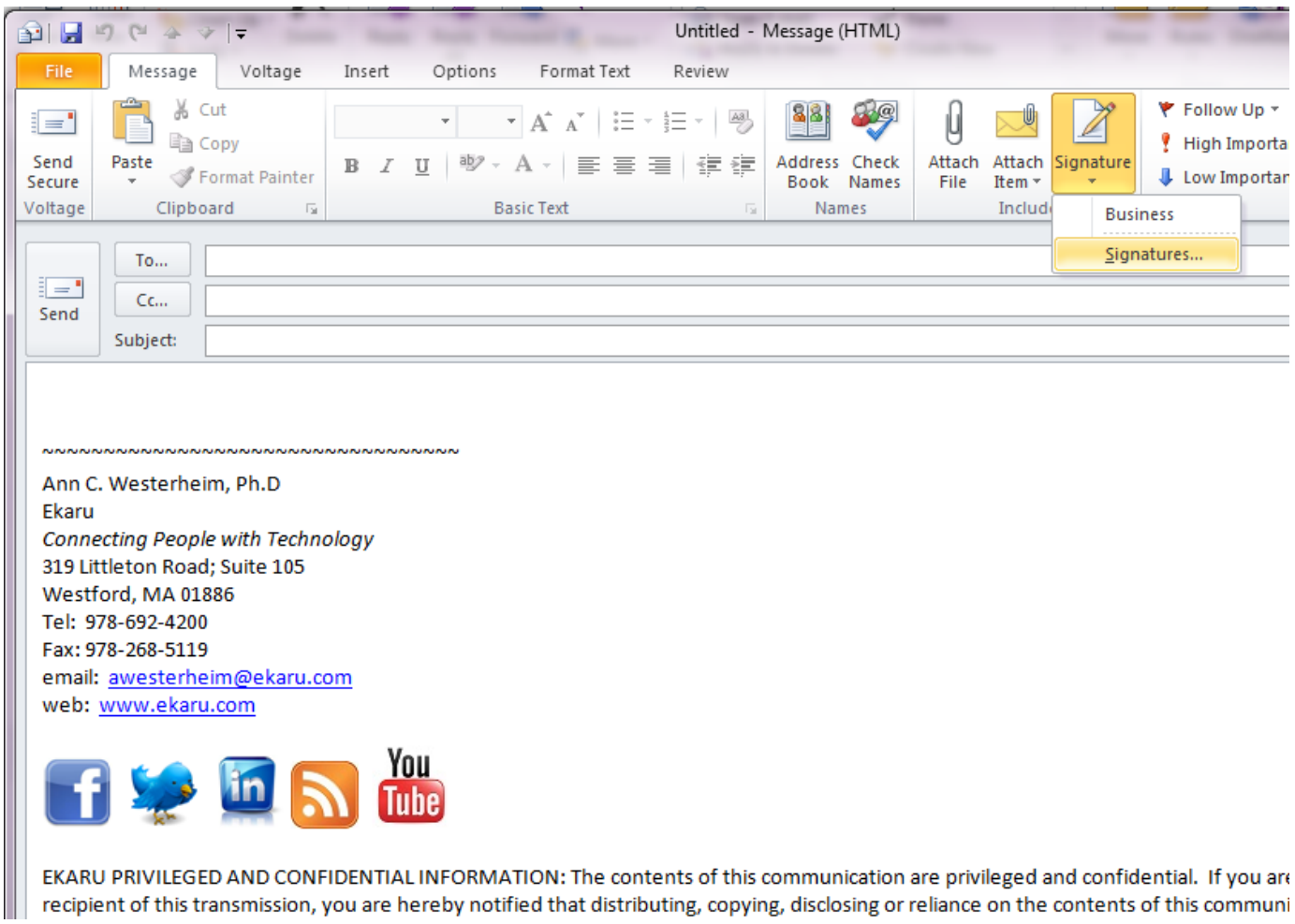
- Syncdroid.net:
 - Similar to iCloud sync for iPhone
 - Many good tools are available
 - Each has pros/cons
 - In general, Exchange is the recommended approach.
- Brian: MyPhoneExplorer
 - <http://www.fjsoft.at/en/home.php>
 - Fully Functional, Fully Free
 - USB/BlueTooth and connectivity over WIFI

eMail + Passcode

- If employees use email on their phones, passcodes are a MUST

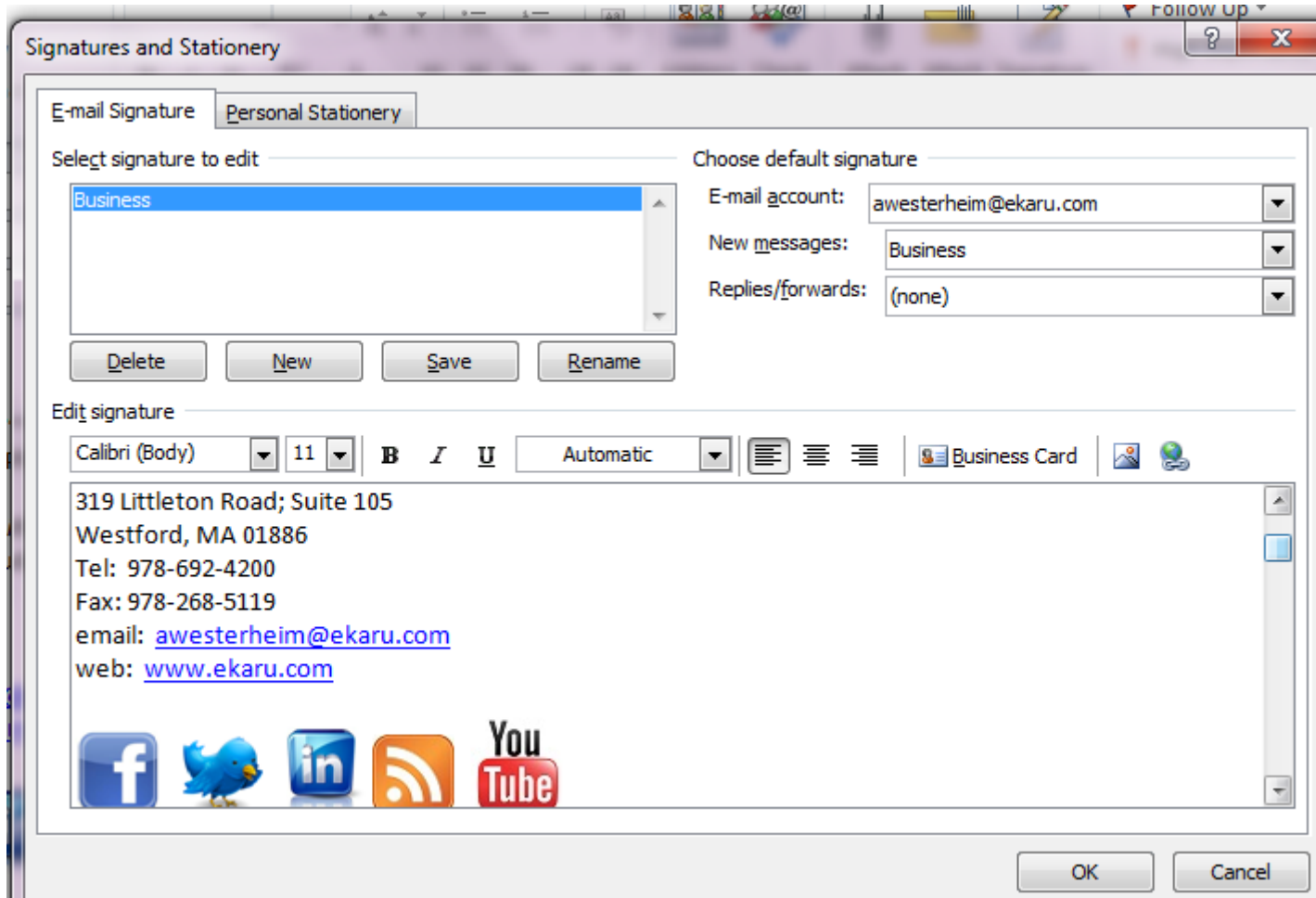


Outlook 2010 - Signatures

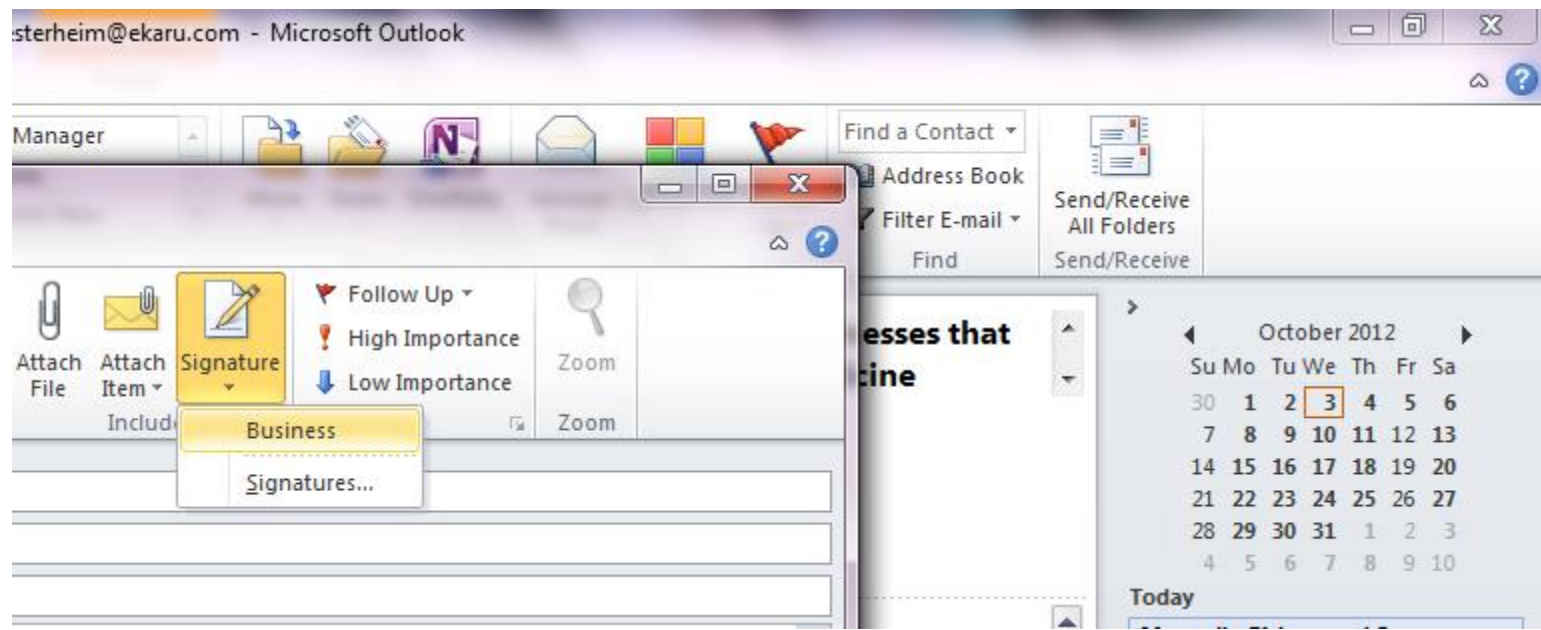


Outlook 2010 - Signatures

- Multiple Signatures
- Logos
- V-Card
- Font
- Disclaimer
- Special Events
- Awards



Select Signature



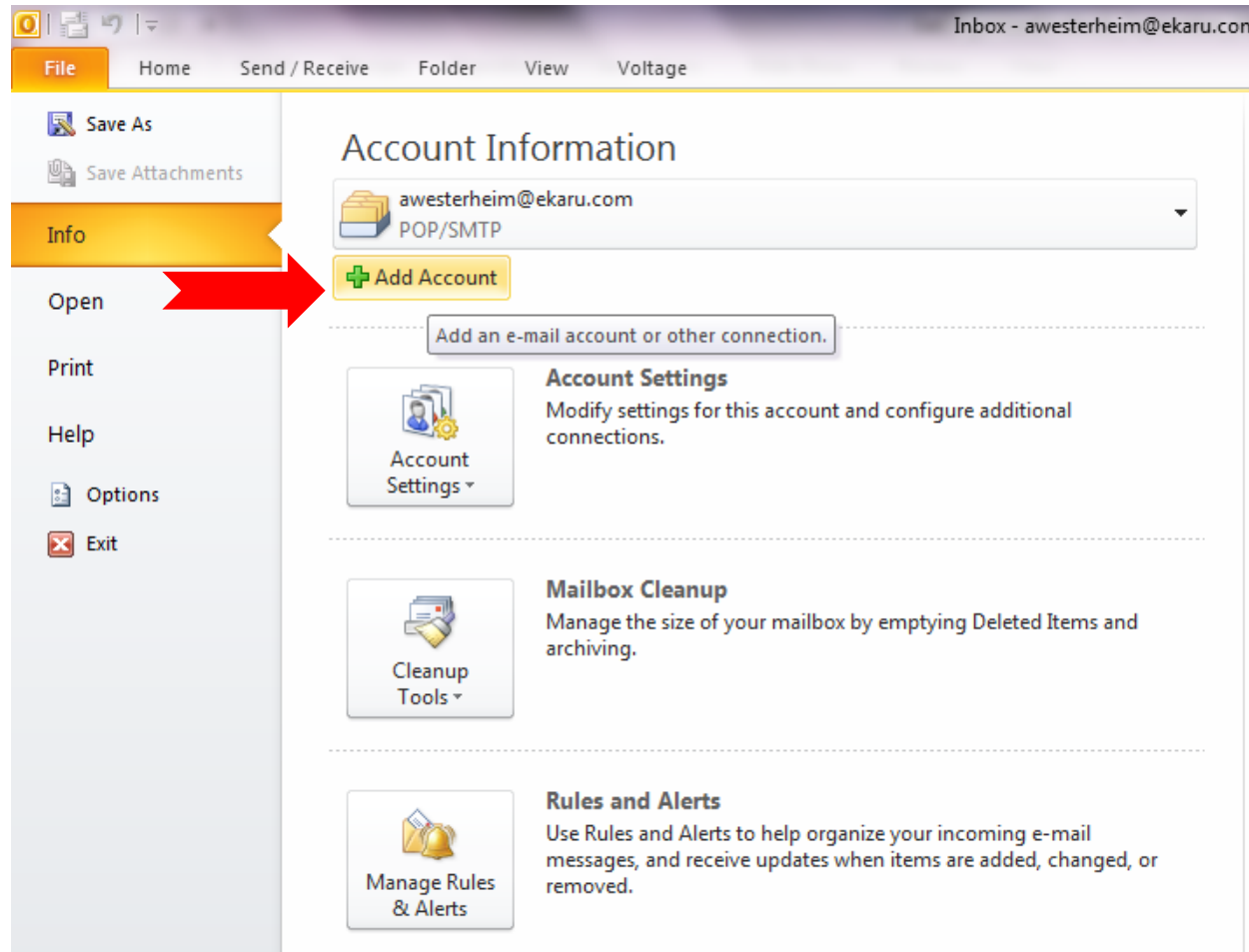
Signatures

- Multiple Signatures
- Logo

eMail – Two (or more) accounts

- Most of us have two or more e-mails
 - Jack@work.com
 - Jack@play.com
- Keep things simple: All in one box
- Many ways to do this
 - Different Windows Users (not practical)
 - Two eMail Accounts
 - One box, (and a rule to organize them)

Outlook – Two Accounts



Outlook – Add an account

Add New Account

Auto Account Setup
Click Next to connect to the mail server and automatically configure your account settings.

E-mail Account

Your Name:
Example: Ellen Adams

E-mail Address:
Example: ellen@contoso.com

Password:

Retype Password:
Type the password your Internet service provider has given you.

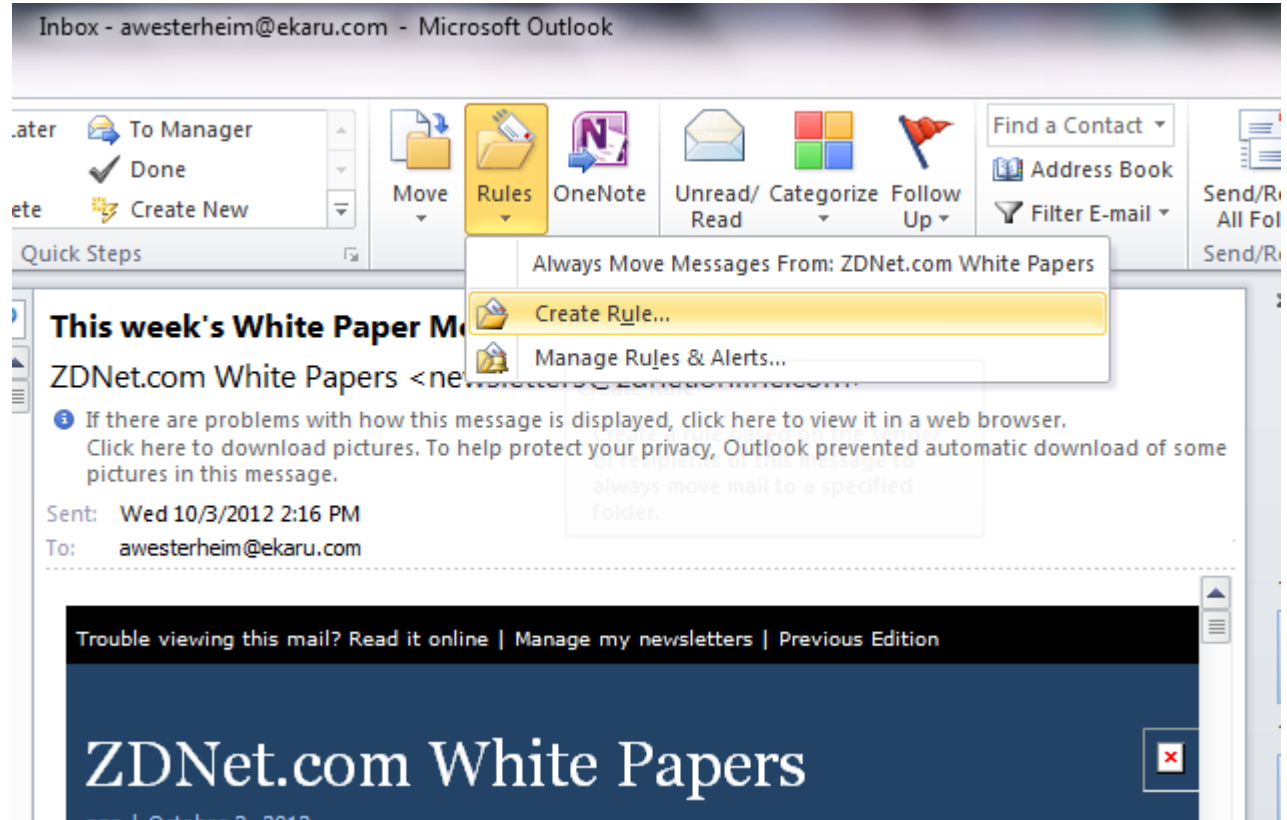
Text Messaging (SMS)

Manually configure server settings or additional server types

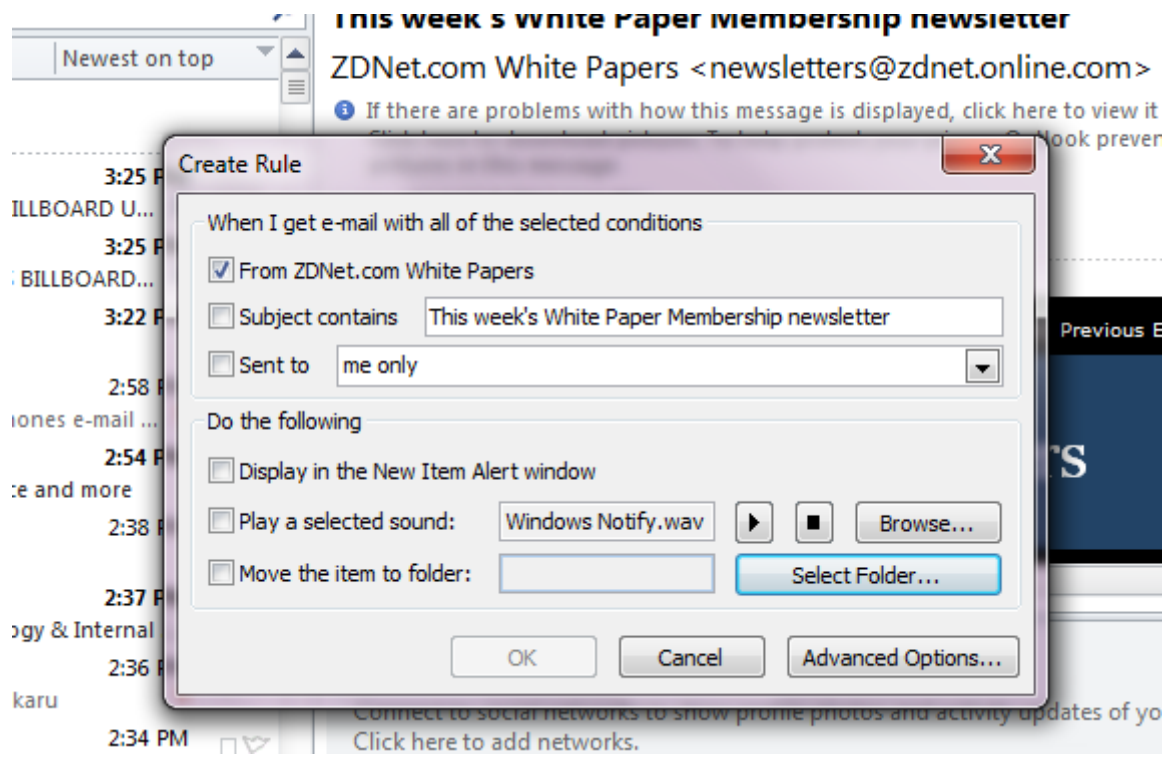
< Back Next > Cancel

“Rules” – Organize Mail

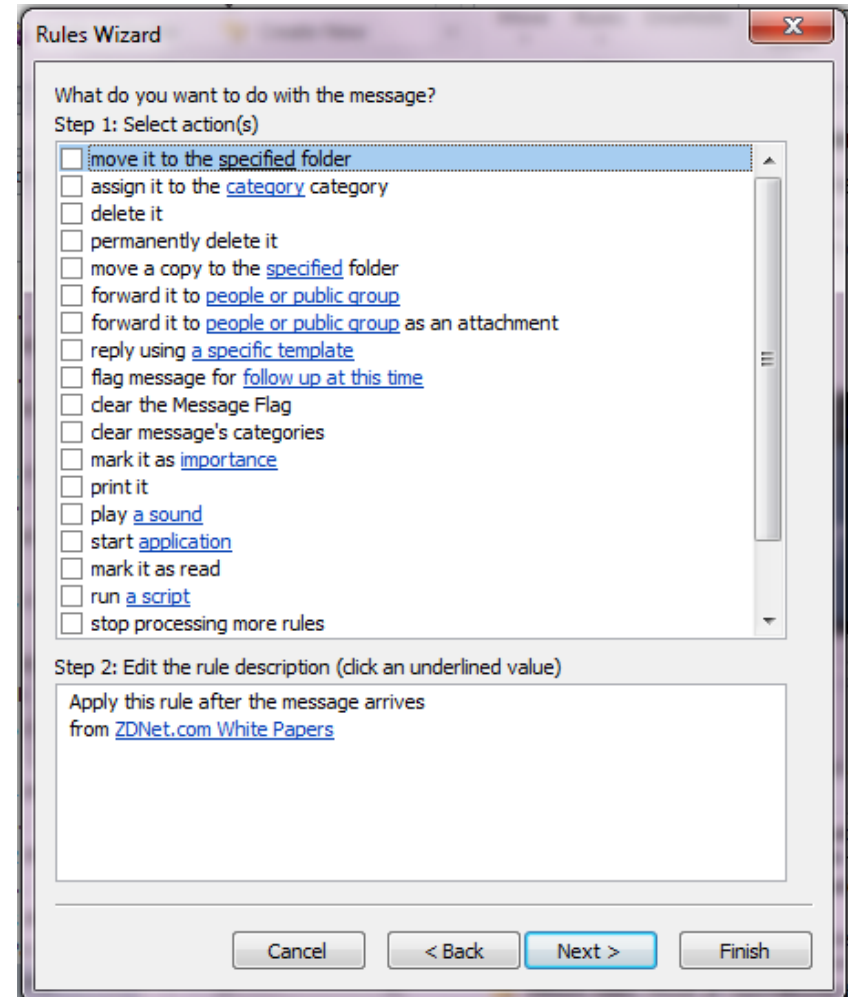
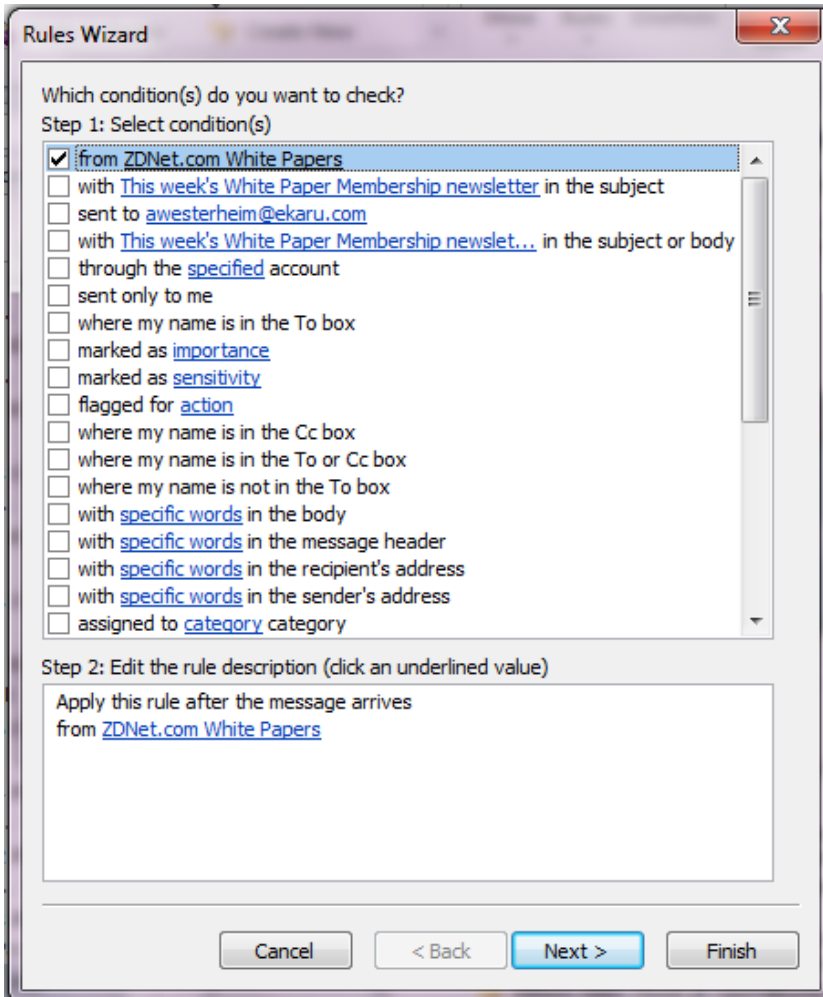
- Home Tab
- “Rules” Button
- Create Rule



“Rules”



"Rules" – Advanced Options



Rules

- Try rules to see what works for you.
- WATCH OUT – your computer will do EXACTLY what you tell it to do... even if its not what you intended!
- Very useful if you get a lot of update alerts.

Microsoft Outlook

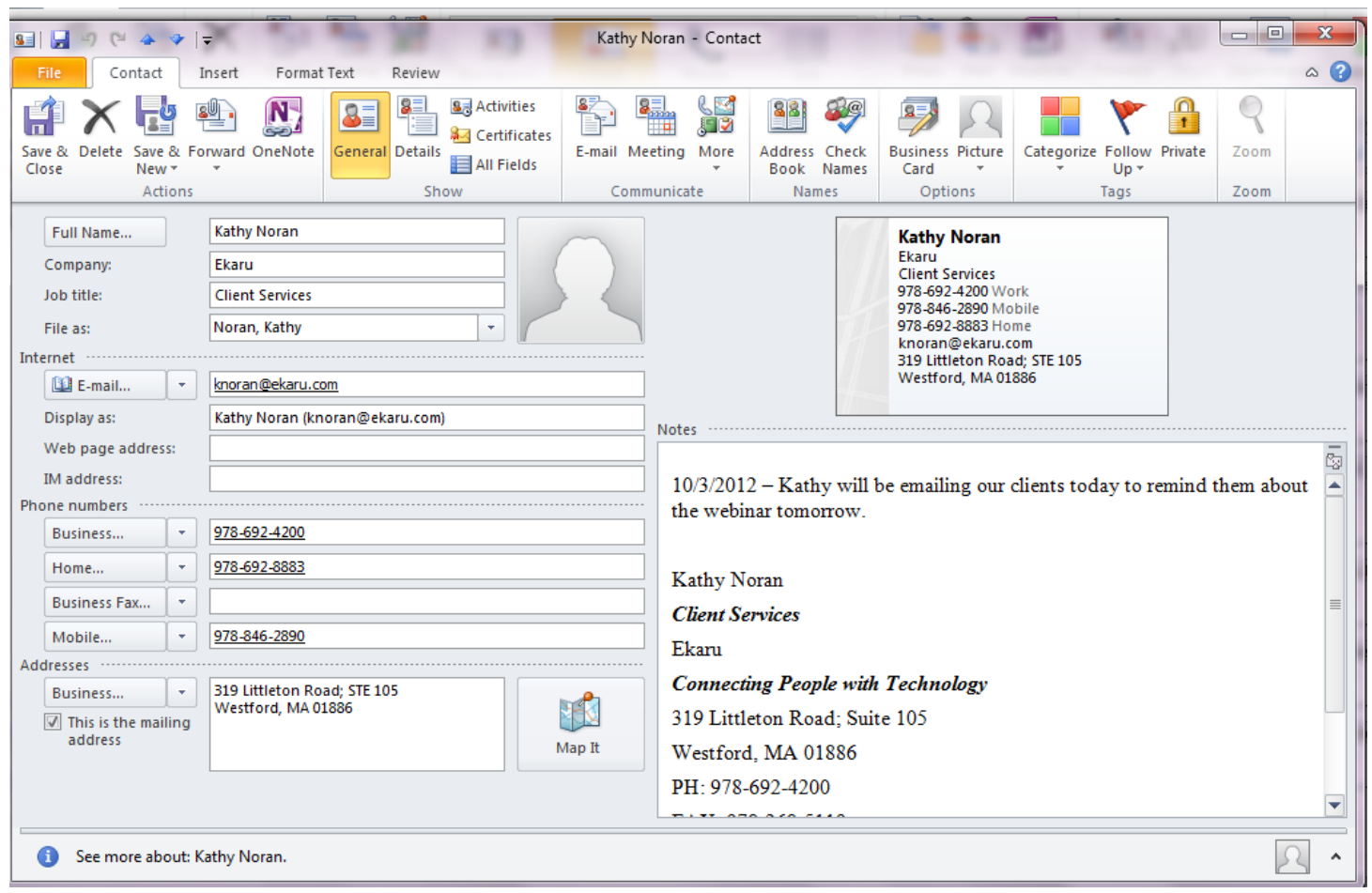
- eMail
- Contacts
- Tasks
- Calendar



Outlook – Managing Contacts

- Great tool for handling Contacts
- File as much information as possible.
- Since E-mail is used for follow-ups, it makes sense to keep an address book current in Outlook.
- Supplement your “CRM” system

Outlook – Contacts



Contacts - Search

Contacts - awesterheim@ekaru.com - Microsoft Outlook

Search Tools

File Home Send / Receive Folder View Voltage

Search

Current Folder
All Subfolders
All Contact Items
All Outlook Items
Scope

Categorized Has Phone Number Has Address More
Refine

Recent Searches Options
Search Tools
Close Search Close

My Contacts

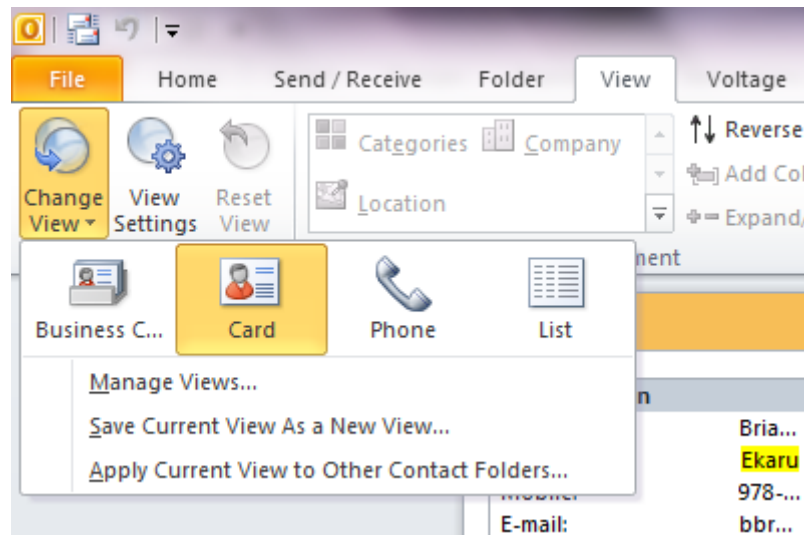
Contacts - awesterheim@ekaru.com
Suggested Contacts
Contacts - 09022010

Ekaru

<p>Brackett, Brian</p> <p>Full Name: Bria...</p> <p>Company: Ekaru</p> <p>Mobile: 978-...</p> <p>E-mail: bbr...</p>	<p>Neal, Tanner</p> <p>Full Name: Tan...</p> <p>Mobile: 978-...</p> <p>E-mail: tne... 207.409.5826 <end></p>	<p>Summers, Peter</p> <p>Full Name: Pete...</p> <p>Mobile: 508-...</p> <p>E-mail: psu...</p>
<p>company@ekaru.com</p> <p>Full Name: com...</p>	<p>Noran, Kathy</p> <p>Full Name: Kat...</p>	

Contacts - Views

- Business Card, Card, Phone, List



Contacts – Additional Fields

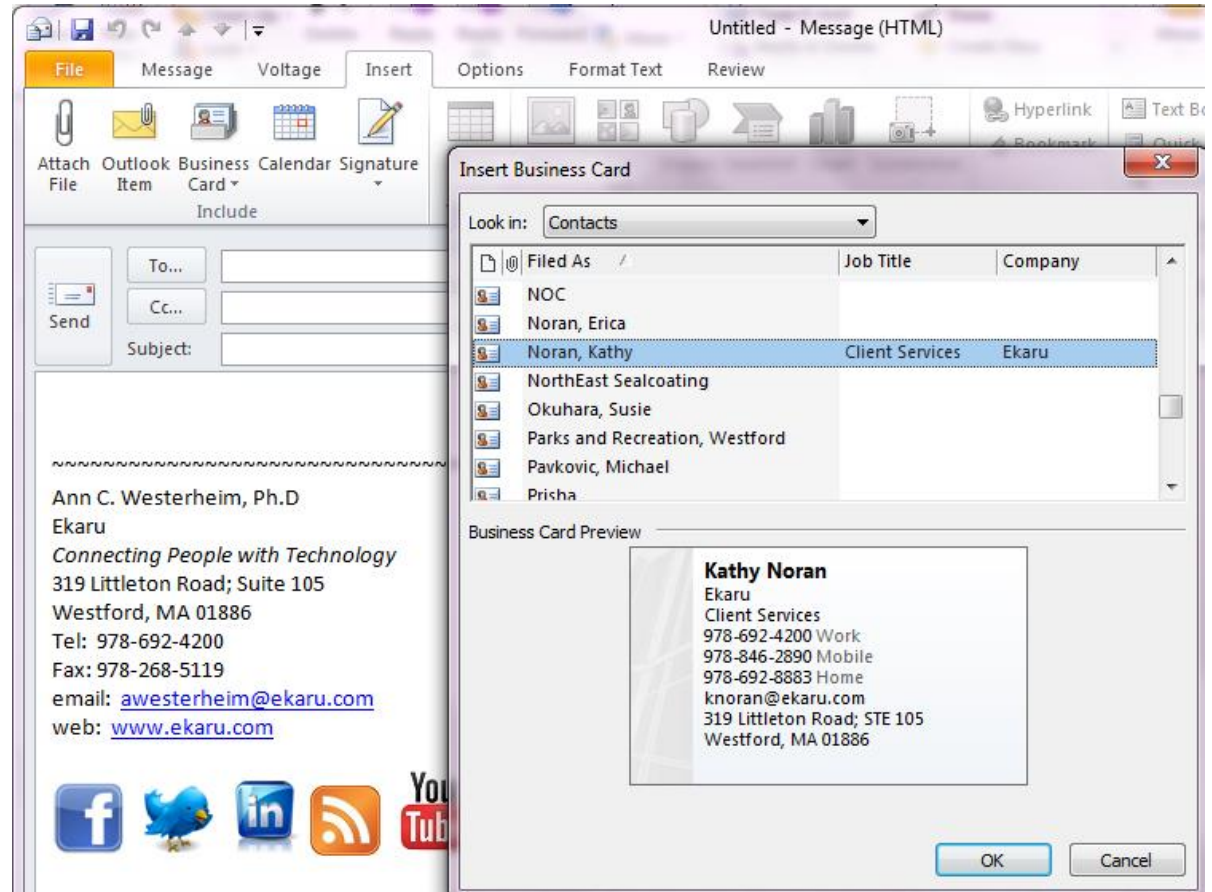
The screenshot shows the 'Kathy Noran - Contact' window in Microsoft Outlook. The 'Details' tab is selected, displaying the following fields:

- Department:**
- Office:**
- Profession:**
- Manager's name:**
- Assistant's name:**
- Nickname:**
- Spouse/Partner:**
- Title:**
- Spouse/Partner:**
- Suffix:**
- Anniversary:**
- Internet Free-Busy:**
- Address:**

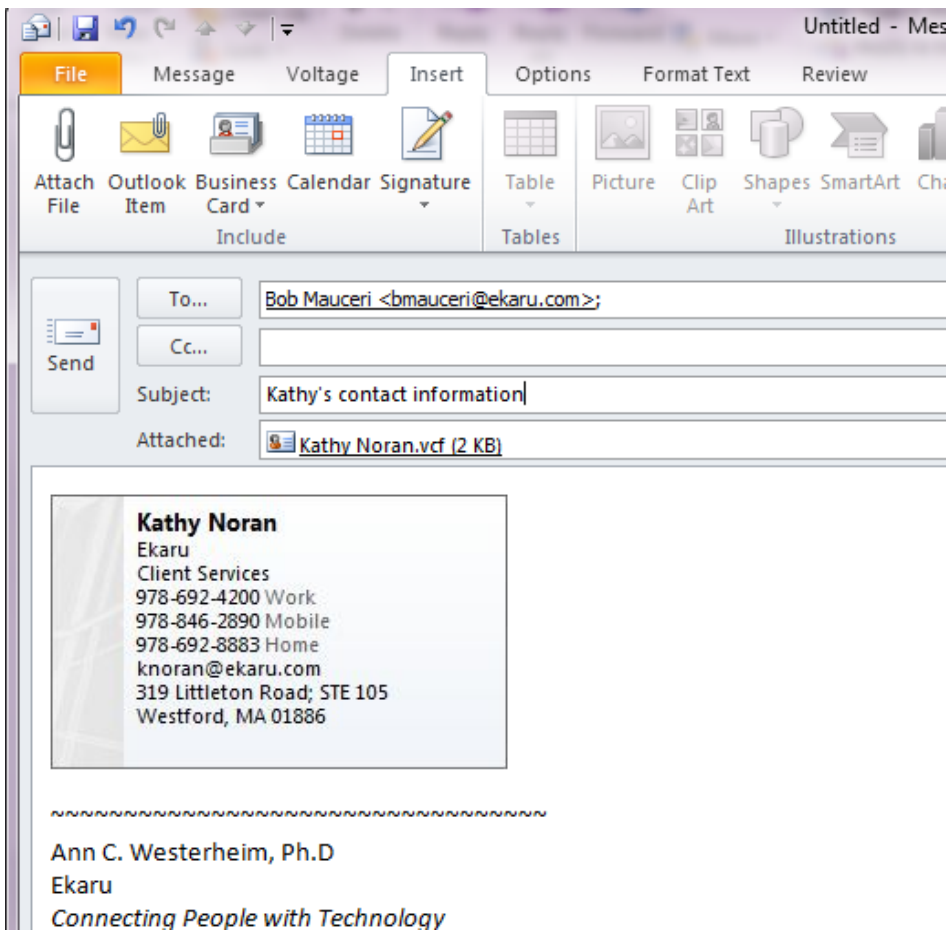
At the bottom left, there is a link: [See more about: Kathy Noran.](#)

Insert a V-Card into email

- "Home" Tab
- "New e-Mail"
- "Insert"
- Business Card
- Select
- "OK"

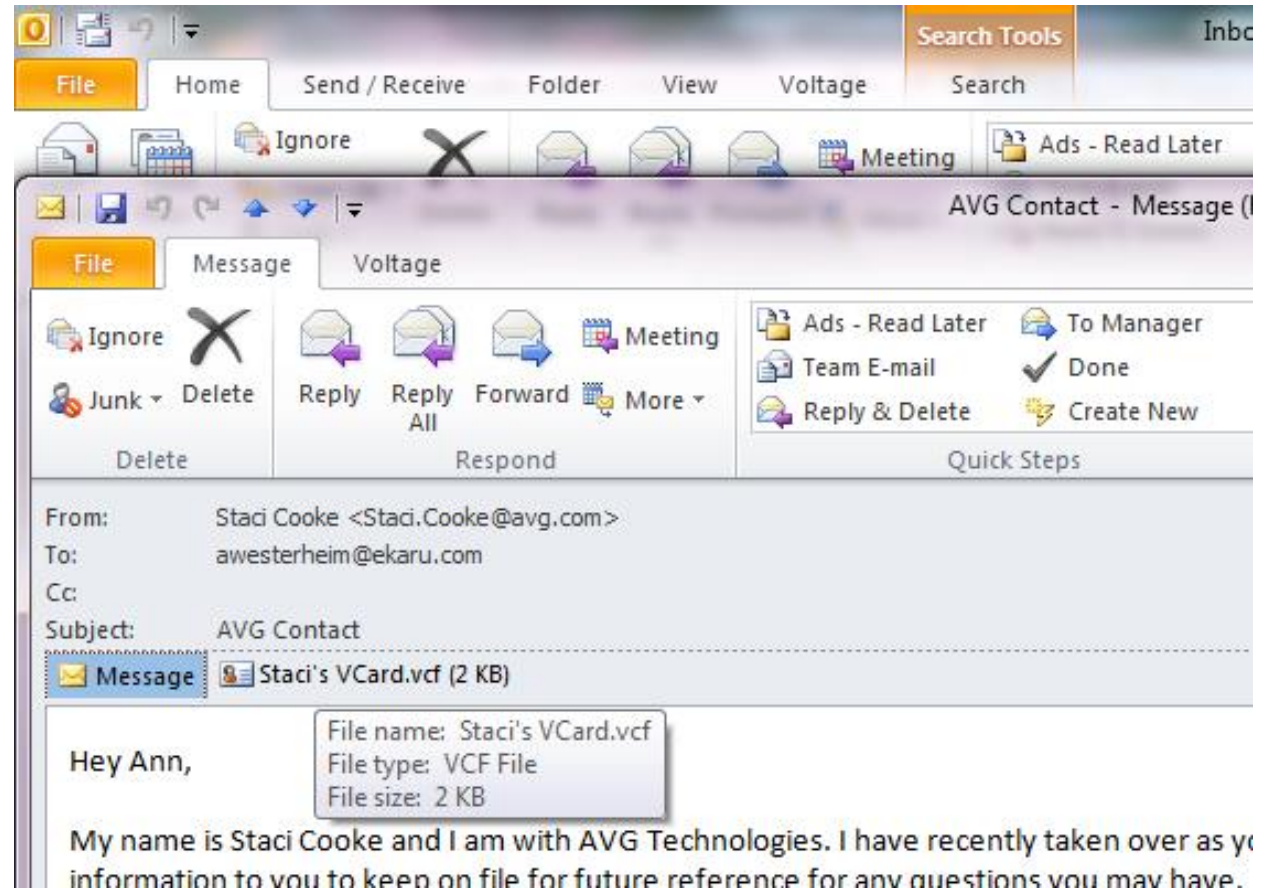


Send a "Vcard"



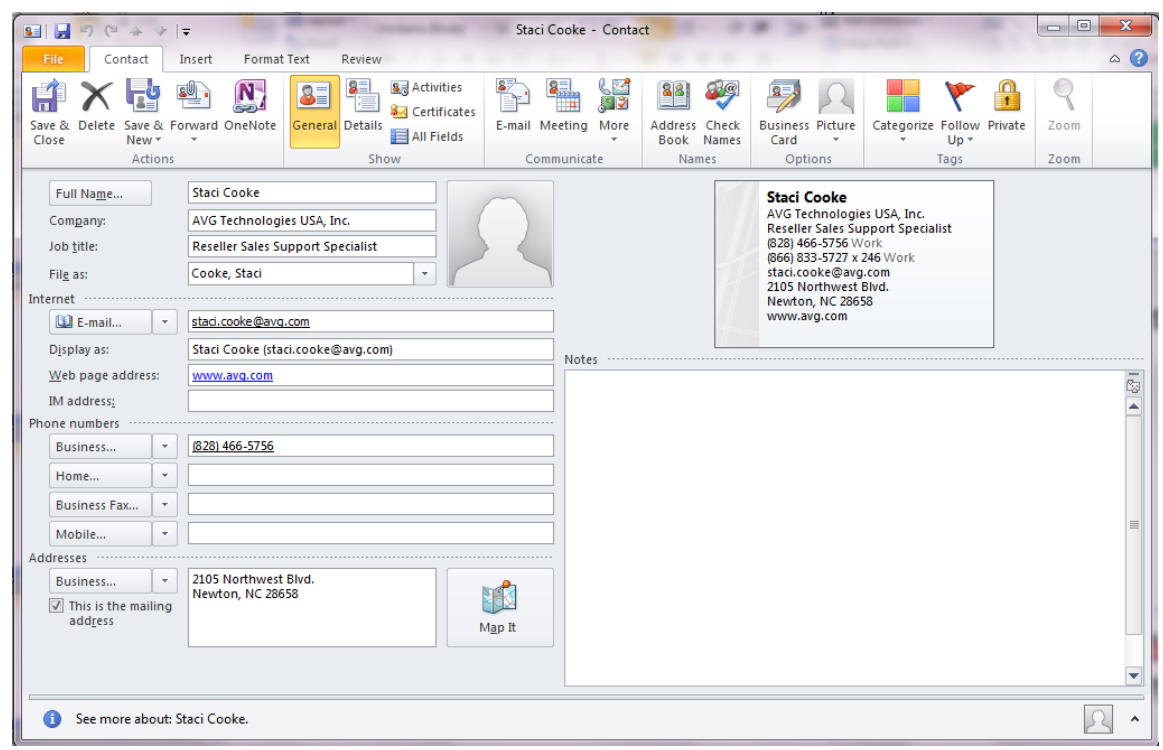
Process a Vcard

- Double-click on the V-Card to open it.



Import a Vcard

- Automatically process a Vcard – double click, then, “Save and Close”



Q: Where to Keep Notes

Kathy Noran - Contact

General
 Full Name...: Kathy Noran
 Company: Ekaru
 Job title: Client Services
 File as: Noran, Kathy

Internet
 E-mail...: knoran@ekaru.com
 Display as: Kathy Noran (knoran@ekaru.com)

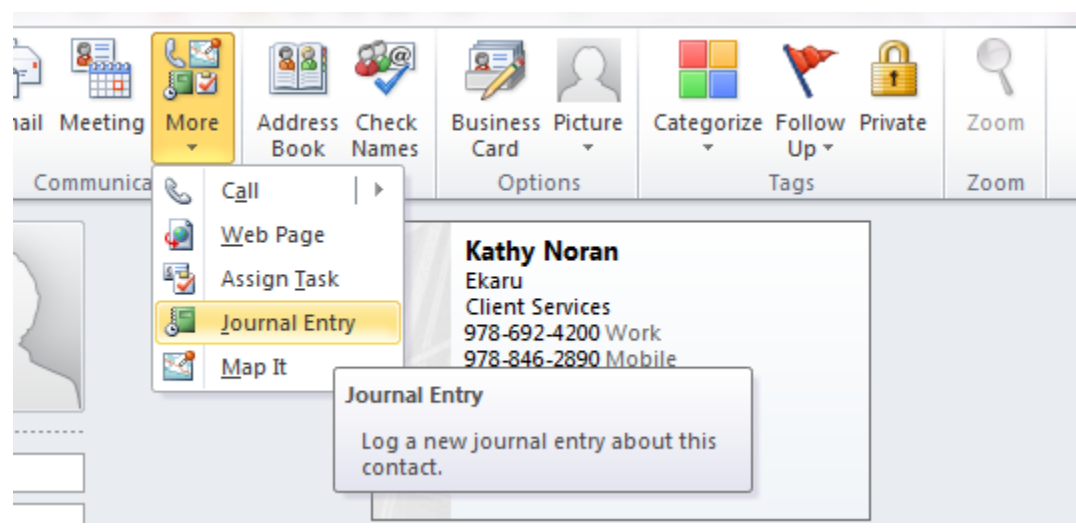
Phone numbers
 Business...: 978-692-4200
 Home...: 978-692-8883
 Mobile...: 978-846-2890

Addresses
 Business...: 319 Littleton Road; STE 105
 Westford, MA 01886

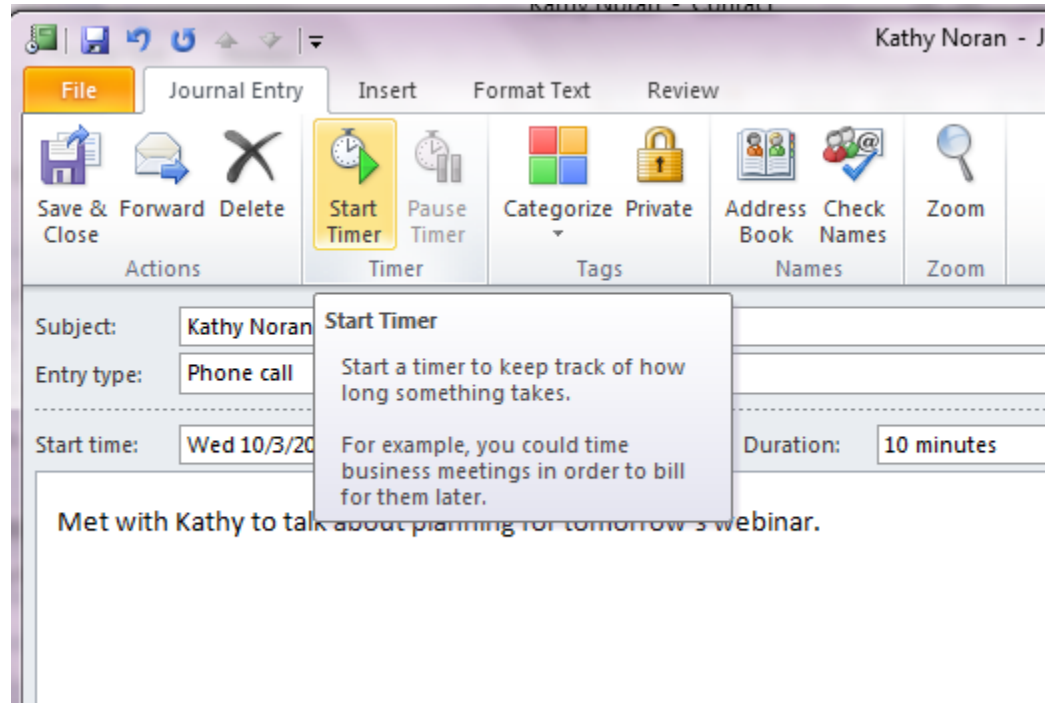
Notes
 10/3/2012 – Kathy will be emailing our clients today to remind them about the webinar tomorrow.

Kathy Noran
 Ekaru
 Client Services
 978-692-4200 Work
 978-846-2890 Mobile
 978-692-8883 Home
 knoran@ekaru.com
 319 Littleton Road; STE 105
 Westford, MA 01886

Journal Entry

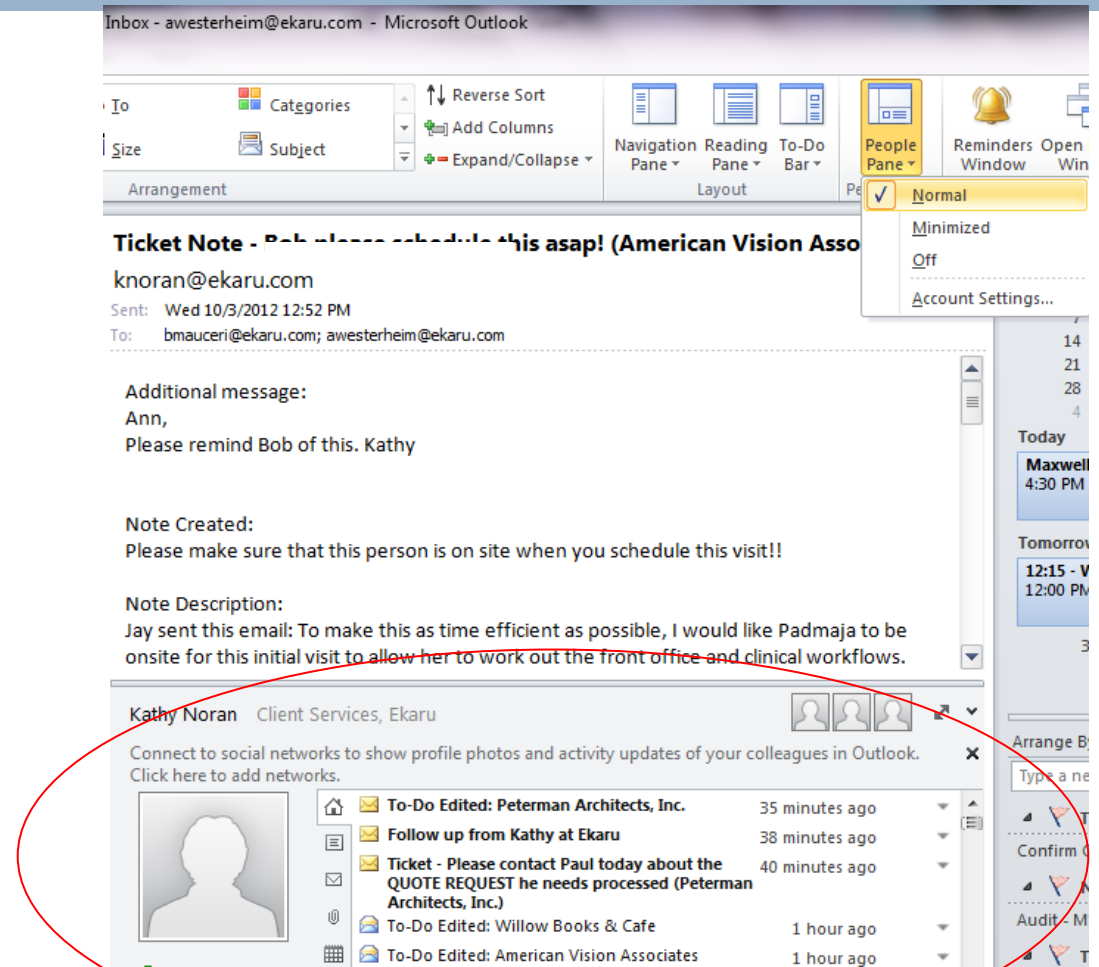


Journal Entry



“People” Pane

- “View” Tab
- “People Pane”



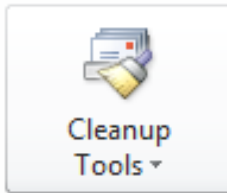


Beyond Outlook

- CRM – Salesforce.com
- Professional Services – Autotask.com

Housekeeping - Archiving

- Archive your mail – if your Outlook file gets too big, Outlook will slow down and crash!
- Compact the pst file (conserve disk space)
 - <http://support.microsoft.com/kb/291645>



File Tab” / “Clean up Tools”

- NOTE – If you haven't done either cleanup step, they will take a LONG time the first time around. DO NOT shut off your computer mid-process!

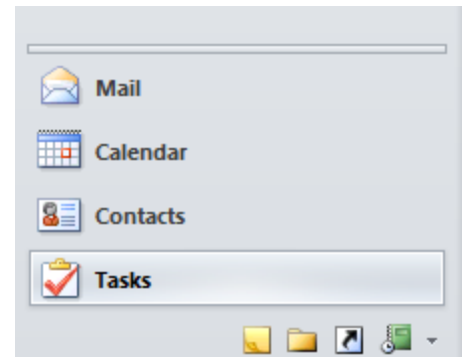
Microsoft Outlook

- eMail
- Contacts
- Tasks
- Calendar



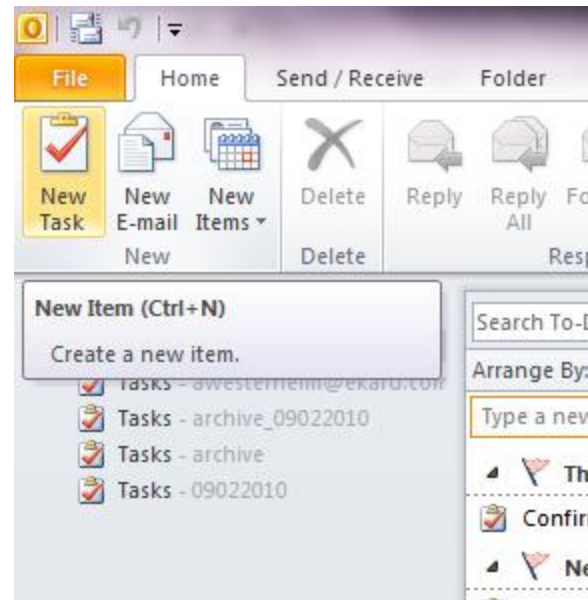
Outlook – Tasks

- Organize “to do” items
- Go paperless!

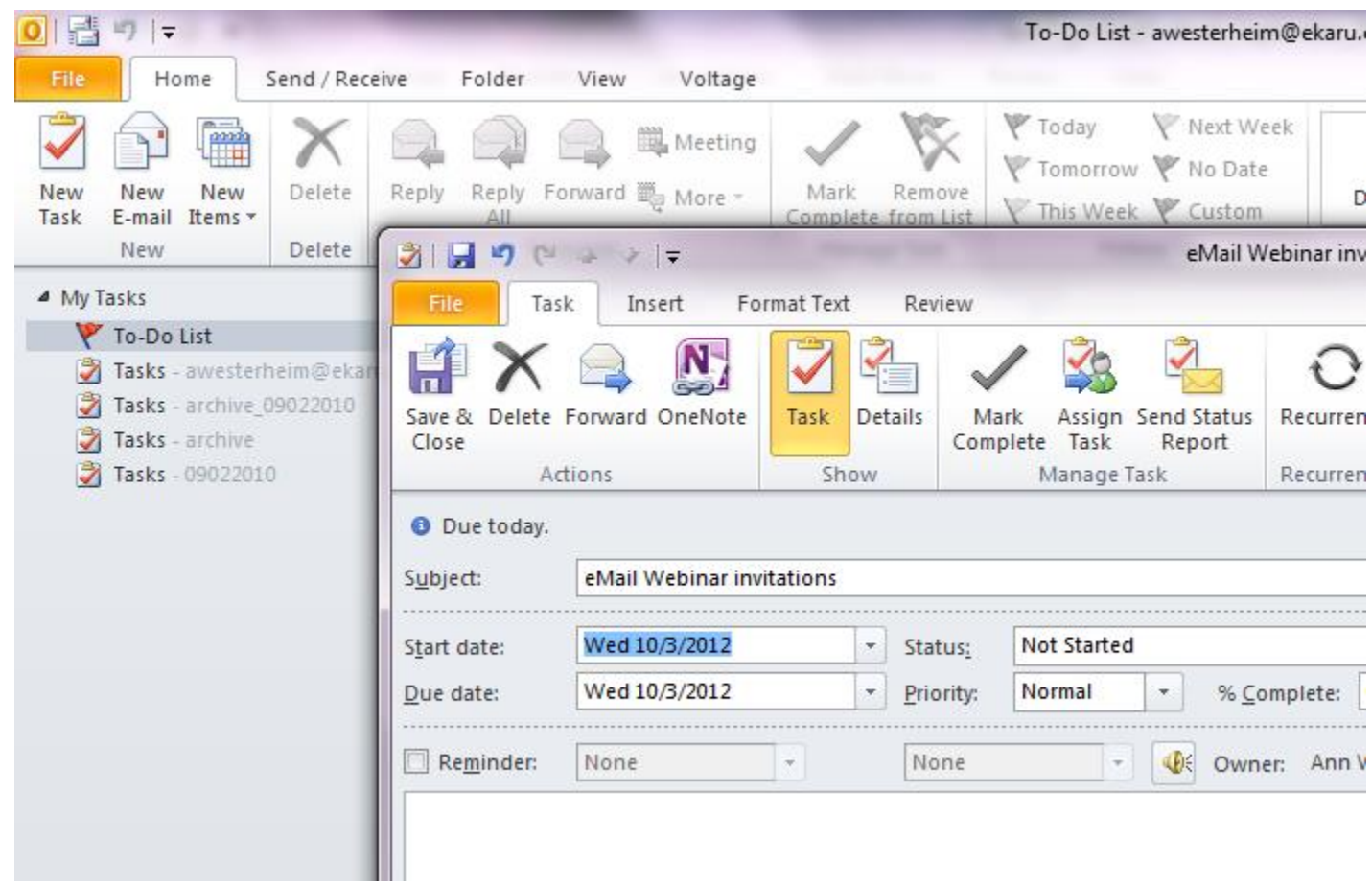


Outlook Tasks

- CTRL "N" creates a new item (or press the button)



Outlook Tasks



Send a task to someone

The screenshot displays the Microsoft Office task management interface. A red arrow points to the 'Assign Task' button in the ribbon. A dropdown menu is open, showing the option 'Assign this task to someone else.' Below this, the 'Task' ribbon is visible, with the 'Task' button highlighted. The task details pane shows the following information:

- To...:** Kathy Noran (knoran@ekaru.com)
- Subject:** Please send out a reminder about the webinar today.
- Start date:** Wed 10/3/2012
- Due date:** Wed 10/3/2012
- Status:** Not Started
- Priority:** Normal
- % Complete:** 0%
- Keep an updated copy of this task on my task list
- Send me a status report when this task is complete

Send a Task...

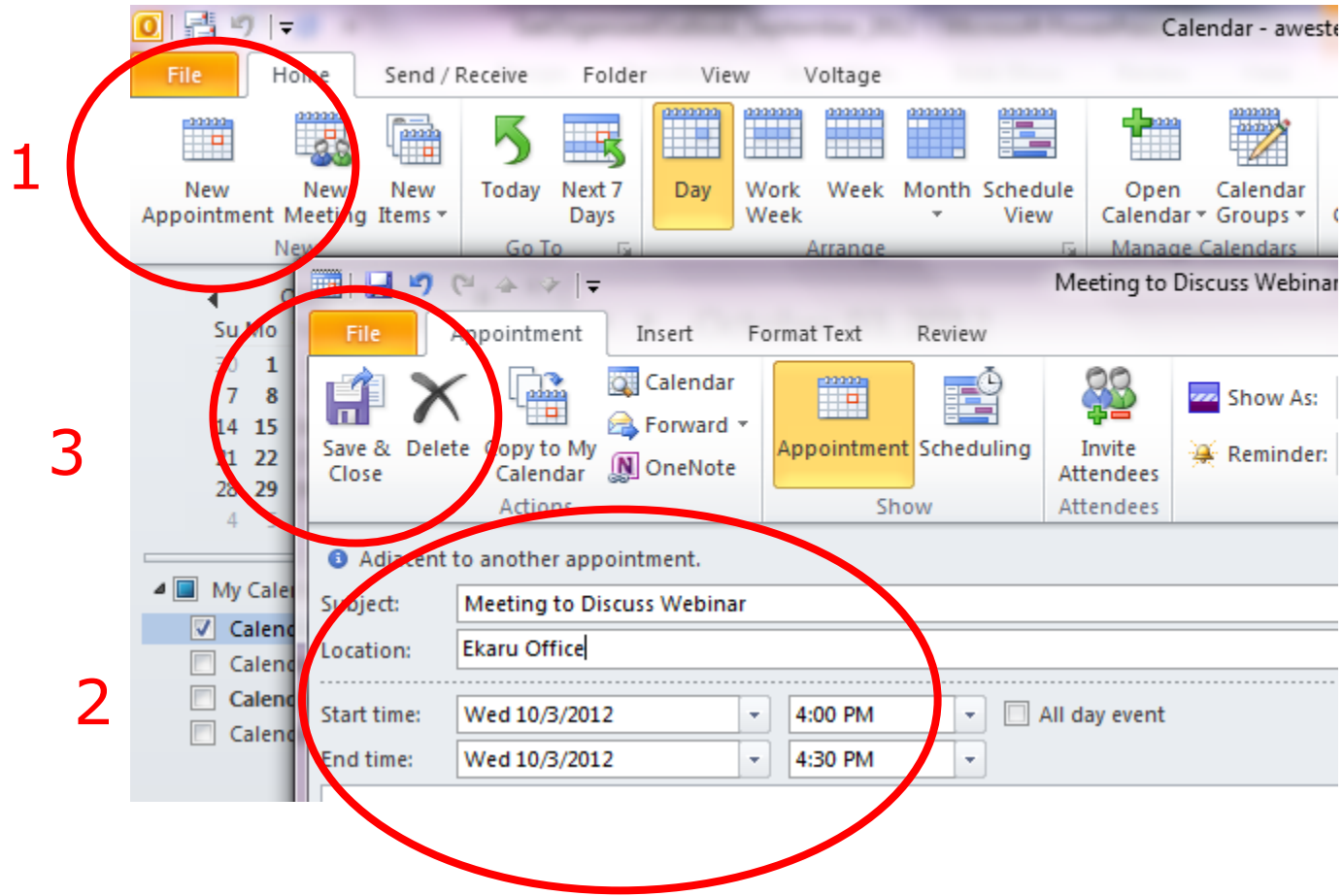
- Kathy receives a message
- She can “accept” or “decline” the task – if she accepts it appears on her task list.

Microsoft Outlook

- eMail
- Contacts
- Tasks
- Calendar



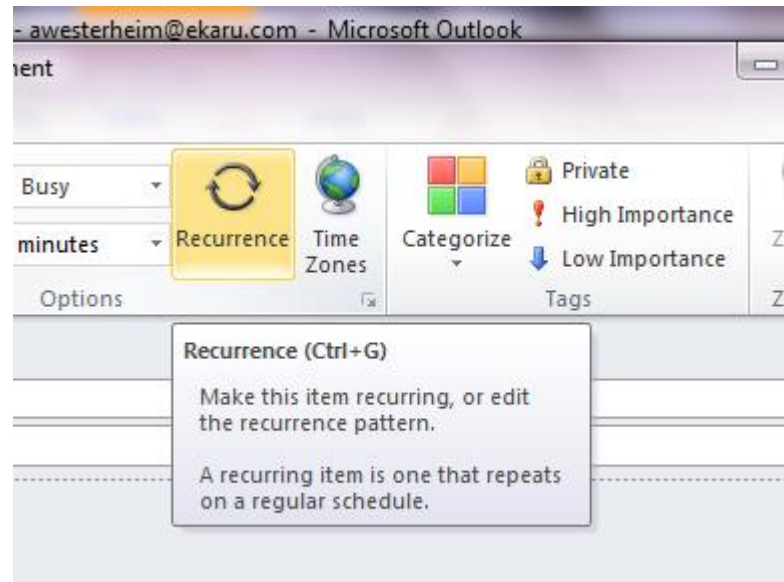
Outlook Calendar



Invite Attendees

The image shows two overlapping screenshots of the Microsoft Outlook interface. The top screenshot displays the 'Appointment' ribbon with the 'Invite Attendees' button circled in red. Below it, a tooltip reads 'Invite Attendees' and 'Invite other people to this meeting.' The bottom screenshot shows a meeting invitation form with the 'Send' button circled in red. The form includes fields for 'From' (awesterheim@ekaru.com), 'To...', 'Subject' (Meeting to discuss Webinar), 'Location' (Ekaru Office), 'Start time' (Wed 10/3/2012 4:00 PM), and 'End time' (Wed 10/3/2012 4:30 PM). A message at the top of the form states 'Invitations have not been sent for this meeting. Adjacent to another appointment.'

Recurring Appointment



Recurring Appointment

Appointment Recurrence

Appointment time

Start: 5:00 PM

End: 5:30 PM

Duration: 30 minutes

Recurrence pattern

Daily Recur every 1 week(s) on:

Weekly Sunday Monday Tuesday Wednesday

Monthly Thursday Friday Saturday

Yearly

Range of recurrence

Start: Wed 10/3/2012

No end date

End after: 10 occurrences

End by: Wed 12/5/2012

OK Cancel Remove Recurrence

One-Click to Everything...

- Right click on Outlook icon in taskbar



Outlook Re-Cap

- You can do a LOT more with Outlook than you may think!
- We covered several examples
 - Working with multiple addresses, filing emails with “rules”, searching contacts, scheduling tasks, recurring appointments, inviting attendees...
- Try a few to see what works for you!
- Clear the clutter and clean house!
- eMail us with questions or if you want more detailed instructions:
info@ekaru.com



Thank You!:

For more information:

Ekaru
Connecting People with Technology
978-692-4200
www.ekaru.com

Sign up for Ekaru's free Technology Advisor e-newsletter