



Quick Reference Guide 7

Outlook 2013 for Windows

Contacts



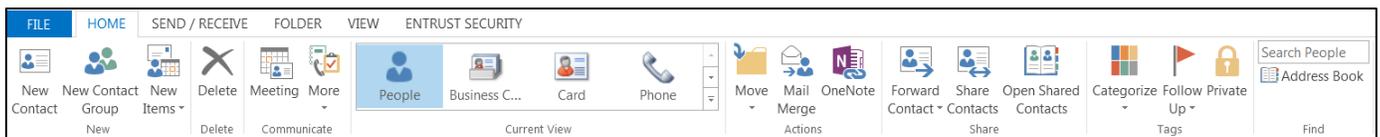
Contacts

As with other Outlook main folders, the **Contacts** folder has multiple tabs with various commands which displays as a ribbon; the commands are organized in logical groups. The tabs replace the menus in previous versions of Outlook. Below are screenshots of the command tabs for the **Contacts**.

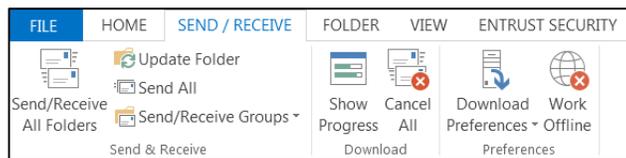
To display the **Contacts**, click the **Contact icon** in the *Navigation Pane* or press **Ctrl+3**.

Contacts Command Tabs and Ribbon

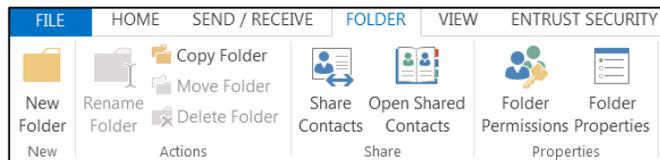
Contacts Home Command Tab: New, Delete, Communicate, Current View, Actions, Share, Tags and Find



Contacts Send / Receive Command Tab: Send & Receive, Download and Preferences



Contacts Command Tab: New, Actions, Share and Properties



Contacts View Command Tab: Current Views, Arrangement, Layout, People Pane and Window



Customize the Quick Access Toolbar for the New Contact Card Window

As with the **Quick Access Toolbars** throughout Office 2013, each Outlook new item window has its own **Quick Access Toolbar** that can be customized by the user. Steps to customize the **Quick Access Toolbars** throughout Outlook are outlined in the Outlook 2013 for Windows QRG 1 – Getting Started.

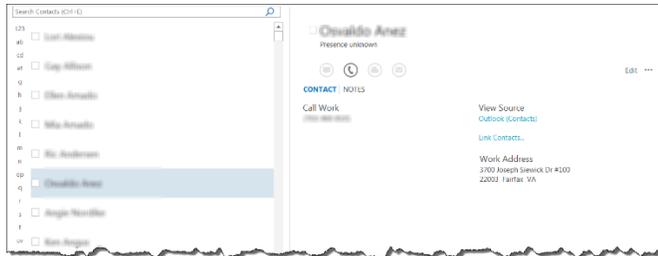
Contact Views

When displaying the **Contacts** folder, the **Home Tab** includes commands for default views: **People, Business Card, Card, Phone** and **List Views**. To learn how to customize views, see the Outlook 2013 for Windows QRG 4 – View Customizations.

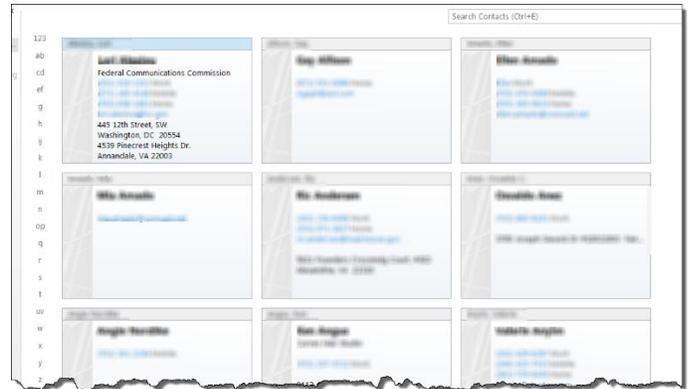


For software training, contact the Computer Training Center (CTC) at 358-1111 or visit the CTC Web site at <http://itcd.hq.nasa.gov/ctc>.

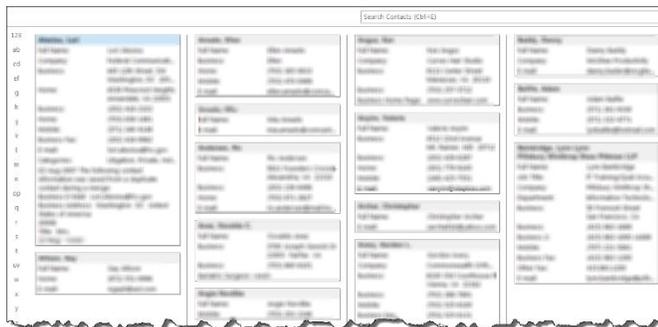
People



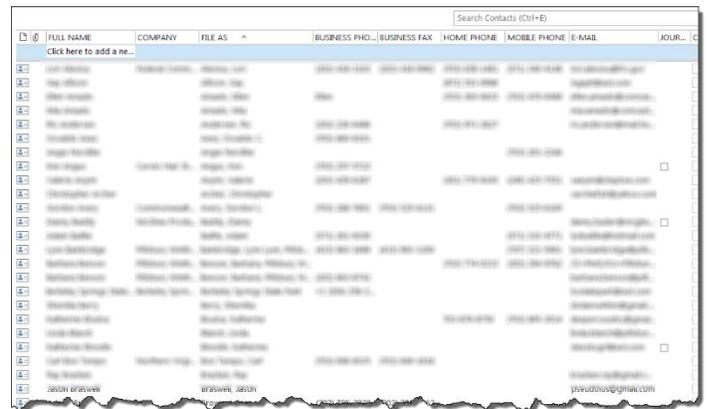
Business Card View



Card View



Phone View



List view

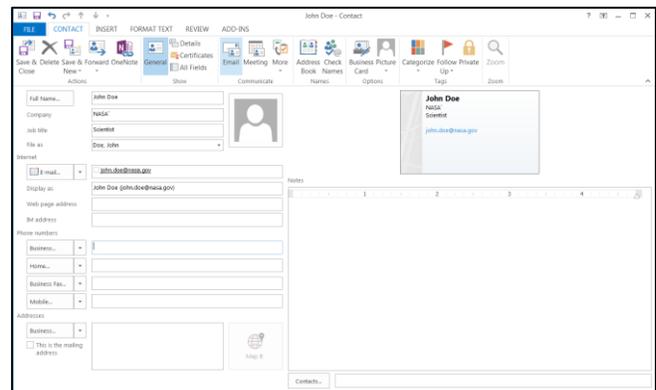
The Phone view and List view are very similar as both display fields in a column format (see Phone view screenshot left). The Phone view includes columns for Full Name, Company, File As, Country/Region, Business Phone, Business Fax, Home Phone, Mobile Phone, E-mail, Journal and Categories. The List view includes columns for the fields Full Name, Job Title, Company, File As, Country/Region, Department, Business Phone, Home Phone, Mobile Phone, E-mail and Categories.

Contact Cards

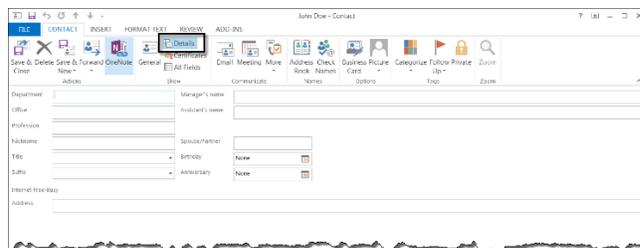
Create a New Contact

- From the **Contacts** folder, click **Home Tab | New Contact**. When viewing the Contacts, press **Ctrl+N** to create a new card, and when not viewing the Contacts, press **Ctrl+Shift+C**. The *Contact* dialog box displays (shown right).
- Enter the **contact** data in the fields provided.

Enter an e-mail address to use the card when drafting messages and enter an address to use your Contact list as a data source for Mail Merge in Word.



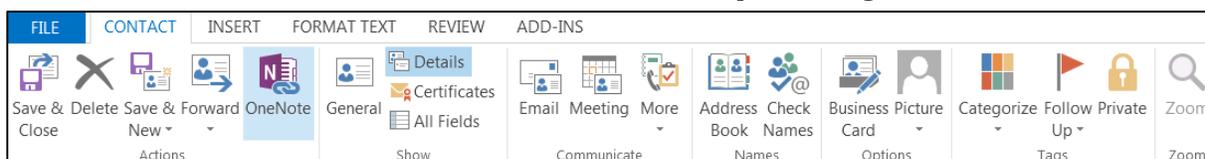
1. Click **Contact Tab | Details** (shown right) to enter data in the additional fields **Department, Manager’s name, Office, Assistant’s name, Profession, Nickname, Spouse/Partner, Title, Birthday, Suffix or Anniversary.**
2. Enter **notes** appropriately in the **text** field provided.
3. Use the commands on the **Contact Command Tabs** (discussed in the section entitled *Customize a Contact Card* at page 3) to insert items, format text, mark private or spellcheck.
4. Click **Save & Close** when complete.



*If enabled, the option Automatically create Outlook contacts for recipients that do not belong to an Outlook Address Book will create a contact card in the Suggested Contacts List (new to Outlook 2013) when you send e-mail messages to people who are not in your Outlook contacts. See the section entitled **Error! Reference source not found.** at page **Error! Bookmark not defined.** for more information.*

Customize a Contact Card

Contact Command Tab: Actions, Show, Communicate, Names, Options, Tags and Zoom

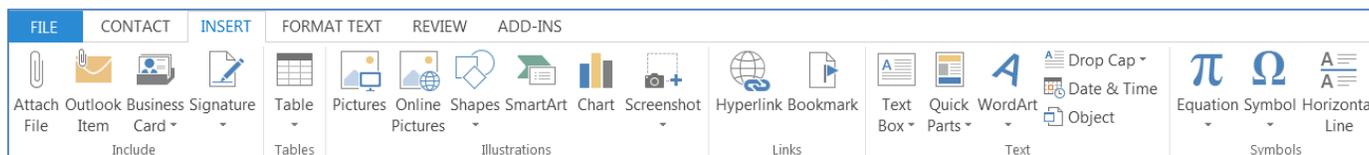


- To continue creating contact cards from the *New Contact* window without closing it, click the **Save & New** drop-down arrow and select. **Save & New** or **Contact from the Same Company**. Selecting **Contact from the Same Company** will save and close the current card and open a *New Contact* window with the company data copied to the new contact.
- Click **Forward** and select from the options:
 - Forward as a **Business Card**. This will attach the card to a message as a *.vcf file (importable into other mail applications) and inserts a graphic of the contact card in the body of the message).
 - Forward **In Internet Format (vCard)**. This will attach the card to a message as a *.vcf file (importable into other mail applications).
 - Forward **As an Outlook contact**. This will attach the card to a message as a *.vcf file (importable into other mail applications).

To forward the text of the contact card, from the message, click Insert Tab | Outlook Item and then select Contacts in the Look in field. In the Items list, select the contact card desired and select the radio button for Insert as: Text only. Click OK.

- Click **E-mail** to draft a message to the contact.
- Click **Meeting** to create a meeting request and address it to the contact.
- Click **Categorize** to apply a category to the item. Steps to create and apply categories are outlined in the Outlook 2013 for Windows QRG 3 – Mail.
- Click the **More drop-down arrow** to **Reply with IM, Call, go to the Web Page, Assign Task, or Map It.**
- Click **Follow Up** to tag the contact card. Click **Custom** from the drop-down list and enter a **Start date, Due date, Reminder** with due date and time. Click **OK**.
- Click **Private** to mark the item private so that delegates or users with shared rights of full detail cannot read the details of the item. Delegates would have to be given the right to review private items to read the detail.

Insert Command Tab: Include, Tables, Illustrations, Links, Text and Symbols



- Click **Attach File** to include a file, click **Outlook Item** to include an e-mail message, task, calendar item, etc. and/or click **Business Card** to include a *.vcf version of the contact in the **Notes**.
- Click **Signature** to include your saved signature in the **Notes**.
- Click **Table** to include a table in the **Notes**. When your cursor is in the table, the **Table Tools** command tabs **Design** and **Layout** display with full Word 2013 functionality.
- Click the illustrations commands for **Picture**, **Clip Art**, **Shapes**, **SmartArt**, **Chart** and/or **Screenshot** to include those graphic types in the **Notes**.
- Click **Hyperlink** to insert a link in the **Notes**.
- Click **Text Box**, **Quick Parts**, **WordArt**, **Drop Cap**, **Date & Time**, **Object**, **Equation**, **Symbol** or **Horizontal Line** to include those items in the **Notes**.

Format Text Command Tab: Clipboard, Font, Paragraph, Styles and Editing



- Click the **Clipboard**, **Font**, **Paragraph** or **Style dialog box launchers** (shown above with rectangle graphics) to display the full dialog boxes for each set of commands.
- Select text and then click any of the buttons to apply changes: **Cut**, **Copy**, **Font**, **Paragraph** or **Styles**.
- Click **Paste** to insert cut or copied text.
- Select the text with the desired formatting then click **Format Painter** copy the format one time from the selected text and paint the same format over newly selected text. Click the **Format Painter** twice to turn on the feature and paint formatting over selected text multiple times. Click **Format Painter** once to turn it off.

Review Command Tab: Proofing and Language



- Click **Spelling & Grammar** to check the spelling or grammar of the contact card.
- Click **Research** to enable the **Research Task Pane** with fields to search reference materials and online.
- Select text and click **Thesaurus** to find a synonym of the selected word.

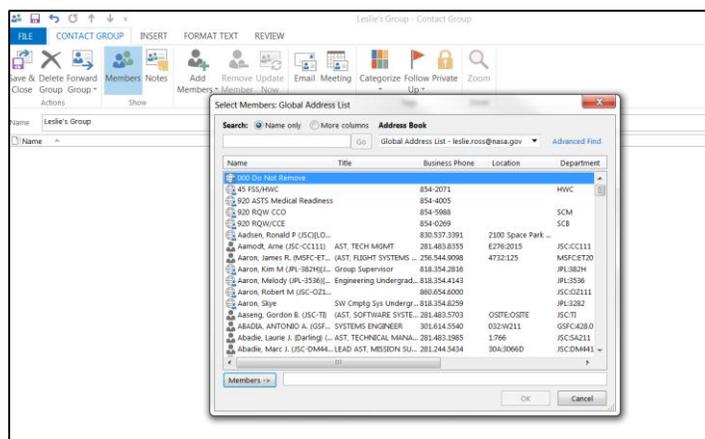
Create Contact Group

Outlook provides the user with a command to create a personal **Contact Group**, however, the potential members must be saved in a Contact card to add name and e-mail address to the **Contact Group**. Fortunately, there is a command within the **Contact Group** features to create a new contact card in the process of adding a member.

Create a New Contact Group

1. From the **Contacts** folder, click **Home Tab | New Contact Group**. The **Contact Group** dialog box displays (shown right).
2. Click into the **Name** field and type a name for the group.
3. Click **Add Member** and select the appropriate contact list. The **Select Members** dialog box will display (shown right).

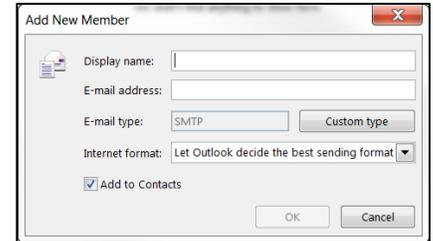
See the section entitled *Create a Contact Card while Adding as a Member* at page 5 for instructions on creating a contact card while adding to a group.



1. Type the last name of the desired new member and click **Go**. A *Search result* displays in the dialog box.
2. Double-click to select the **name** from the search result list and then click **OK**.
3. Use the commands on the **Contact Command Tabs** (discussed in the section *Customize a Contact Card* at page 3) to insert items, format text, mark private or spellcheck.
4. Click **Save & Close**. The **Contact Group** displays in the Contact list along with the individual contact cards.

Create a Contact Card while Adding as a Member

1. From the **New Contact Group** dialog box, click **Add Member | New E-mail Contact**. The *Add New Member* dialog box displays (shown right).
2. Type the **Display name** for the new contact.
3. Type the **E-mail address** for the new contact.
4. To add this contact to your Contact list as well as the group, click to select the checkbox **Add to Contacts**.
5. Click **OK**. The contact saves in your Contact list and is a member of the group.



It is recommended that you open the Contact card from your Contact list and enter address and phone information to complete the Contact card.

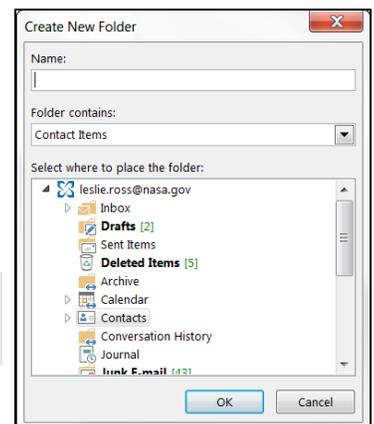
Personal Contact List

You can create a personal contact list and display it as an address book when addressing messages.

Create a Personal Contact List

1. With the **Contacts** folder displayed, right-click on **My Contacts** in the Folder List in the *Navigation*. A shortcut menu displays.
2. Click **New Folder**. The *Create New Folder* dialog box displays (shown right).
3. Click into the **Name field** and type the desired name.
4. Ensure **Contact Items** is select for the **Folder contains** field.
5. Ensure the **Contacts** folder is selected in the **Select where to place this folder** list.
6. Click **OK**.
7. You can create new cards in the new personal Contact List or click and drag cards from existing Contact Lists to the new personal Contact List.

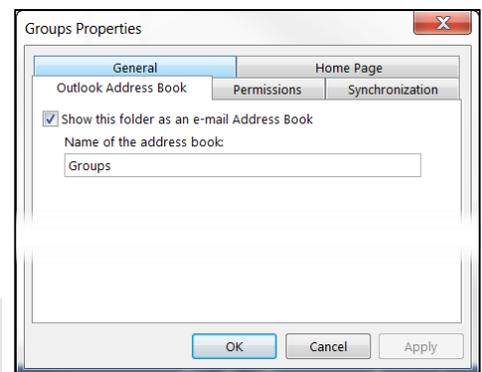
*Once you create a personal Contact list, you will probably want to display it when searching for addressees for messages. You need to enable the option **Show this folder as an e-mail Address Book** to use it when addressing messages. See the section below for instructions.*



Show a Personal Contact List as an E-mail Address Book

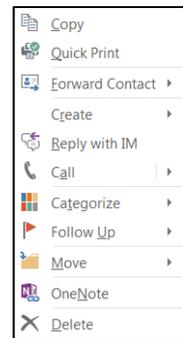
1. Right-click on the new personal Contact List in the Folder list in the *Navigation*. A shortcut menu displays.
2. Click on **Properties**. The *Properties* dialog box displays (shown left).
3. Click the **Outlook Address Book Tab**. Here you can change the name of the Contact list.
4. Enable the checkbox for the option **Show this folder as an e-mail Address Book**. Click **OK**.

*Going forward if you want to address an e-mail message or Meeting Request to a contact stored in your personal Contact list, simply click the Address Book drop-down arrow in the *Select Names* dialog box and select your personal Contact List to search in.*



Work with Contacts (from Contact List)

1. Right-click on a Contact card to display a shortcut menu (shown right).
2. From the shortcut menu, **left-click** on the desired command:
 - **Copy, Quick Print, Forward the Contact** or **Reply with IM** to send a Lync instant message.
 - Click **Create** and select from the options to create an **E-mail, Meeting, or Assign task** using the Contact.
 - Click **Categorize**, flag for **Follow Up, Move** or **Delete**.



Share Contacts

Share a Single Contact card

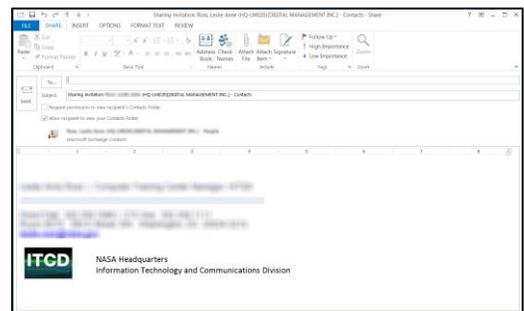
1. From the **Contacts** folder, highlight the Contact card to be shared.
2. Click **Home Tab | Forward Contact drop-down arrow**. Select from options to forward:
 - **As a Business Card.**
 - **As an Outlook Contact.**

OR

3. From the **Contacts** folder, highlight the Contact card to be shared.
4. **Right-click** the Contact card to display a *Shortcut menu* and click on **Copy** or press **Ctrl + C**.
5. Create an e-mail message, **right-click in the body** of the message and click on **Paste** or press **Ctrl + V**.

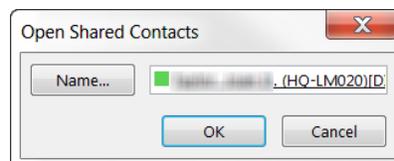
Share Entire Contacts Folder

1. From **Contacts** folder, click **Home Tab | Share Contacts**. An e-mail message opens with **Contacts** folder attached (shown right).
2. Click **checkbox** to enable/disable **Request permissions to view recipient's Contacts folder**.
3. Click **checkbox** to enable/disable **Allow recipient to view your Contacts folder**.
4. **Address** and **send** e-mail normally.



Open Shared Contacts

1. From **Contacts** folder, click **Home Tab | Open Shared Contacts**. The *Open Shared Contacts* dialog box displays (shown below).



2. Click **Name** to search for the Contacts folder Owner's name. The *Select Name* dialog box displays.
3. Enter a **search term** in the **Search** field and click **Go** or press **ENTER**. A *Search* result displays.
4. Click to select the appropriate name and click **OK**.
5. Click **checkbox** to enable/disable **Allow recipient to view your Contacts folder**.
6. Click **OK** to dismiss the *Open Shared Contacts* dialog box.

Contact Options

Click **File Tab | Options | People** to display the Contact options and change how you work with your contacts.

Contact Options: Names and Filing

- Click the **drop-down arrow** for the **Default Full Name order** and select the appropriate sort from the options **First (Middle) Last, Last First** or **First Last1, Last2**.
- Click the **drop-down arrow** for the **Default “File As” order** and select the appropriate sort from the options: **Last, First; First Last; Company; Company (Last, First);** or **First Last (Company)**.
- Click the checkbox to enable/disable the option **Check for duplicates when saving new contacts**.

Contact Options: Contacts Index

You can use an additional language to index the Contact list.

- Enable **Show an additional index**.
- Click the **drop-down arrow** for the **Additional contact index** field and select the desired **language**.

Contact Shortcut Keystrokes			
<i>To do this</i>	<i>Press</i>	<i>To do this</i>	<i>Press</i>
Dial a new call.	CTRL+SHIFT+D	Update a list of Contact List members.	F5
Find a contact or other item (Search).	F3 or CTRL+E	Go to a different folder.	CTRL+Y
Enter a name in the Search Address Books box.	F11	Open the Address Book.	CTRL+SHIFT+B
In the Card or Business Card view of contacts, go to the first contact that begins with a specific letter.	SHIFT+letter	Use Advanced Find .	CTRL+SHIFT+F
Select all contacts.	CTRL+A	In an open contact, open the next contact listed.	CTRL+SHIFT+PERIOD
Create a message that uses the selected contact as subject.	CTRL+F	Find a contact.	F11
Create a Journal entry for the selected contact.	CTRL+J	Close a contact.	ESC
Create a contact (when in Contacts).	CTRL+N	Send a fax to the selected contact.	CTRL+SHIFT+X
Create a contact (from any Outlook view).	CTRL+SHIFT+C	Open the Check Address dialog box.	ALT+D
Open a contact form that uses the selected contact.	CTRL+O	In a contact form, under Internet , display the E-mail 1 information.	ALT+SHIFT+1
Create a Contact List.	CTRL+SHIFT+L	In a contact form, under Internet , display the E-mail 2 information.	ALT+SHIFT+2
Print.	CTRL+P	In a contact form, under Internet , display the E-mail 3 information.	ALT+SHIFT+3

In the Electronic Business Cards dialog box

<i>To do this</i>	<i>Press</i>	<i>To do this</i>	<i>Press</i>
Open the Add list.	ALT+A	Select the Image Align drop-down list.	ALT+G
Select text in Label box when the field that has a label assigned is selected.	ALT+B	Select color palette for background.	ALT+K, then ENTER
Open the Add Card Picture dialog box.	ALT+C	Select Layout drop-down list.	ALT+L
Place the cursor at beginning of Edit box.	ALT+E	Remove a selected field from the Fields box.	ALT+R
Select the Fields box.	ALT+F		