

OUTLOOK - Managing Contacts Using Folders

When **Outlook Contacts** are created, they are saved and grouped together in your **Main Contacts List** in a format called business card.

You can utilize the **Outlook Contact Folders** feature to

- organize your Outlook business cards (contacts)
- group contacts that are similar
- send e-mails to large numbers of contacts at once.

Use Outlook Contact Folders when:

You need to send a press release by e-mail to all the newspapers in S.C.

or

You need to send e-mails to a group of constituents that are interested in a specific piece of legislation.

'FLASHBACK'

When we used GroupWise e-mail, we utilized e-mail groups to send e-mails messages to multiple recipients. After careful research, LPITS has discovered that **Outlook Contact Folders** is the most effective way to send e-mail messages to multiple recipients. While the Outlook feature called '**Distribution Lists**' works great for managing **small numbers** of contacts, the **Contact Folders** feature enables you to manage an unlimited number of contacts with a lot more flexibility.

The instructions below will guide you through creating, organizing and managing Contact Folders

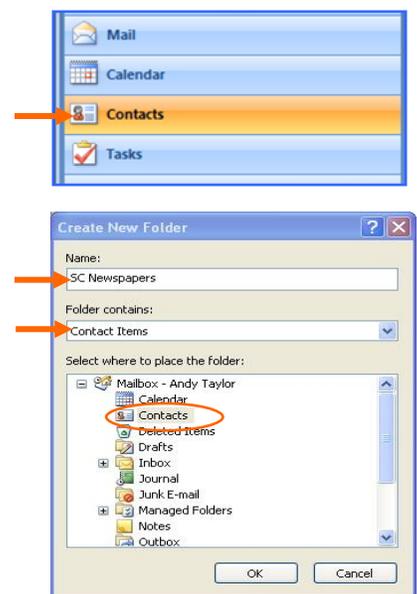
GroupWise e-mail addresses that you saved prior to our conversion to Outlook e-mail can be converted to Outlook Contacts and can then be added to any Contact Folders that you create. See instructions at the bottom of page 6.

Open Outlook and select **Contacts** in the Outlook Navigation bar to display all contacts.

1. Click **File** (on the menu bar), click **New**, and then click **Folder**.

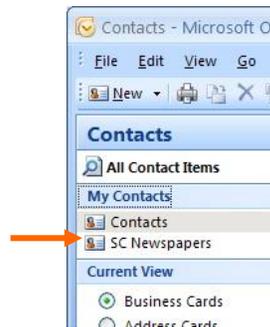
The Create New Folder dialog box will appear.

2. **Type a name** for the new Contact folder in the Name: field.
3. Verify that **Contact Items** is selected in the Folder Contains field.
4. Verify that **Contacts Folder** is selected in the box below.
5. Click **OK**.



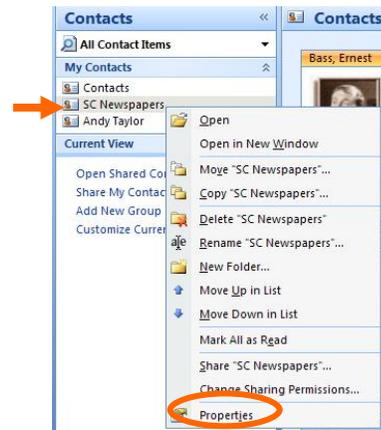
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The new contact folder will be added to your **Contacts Folder List** (in the column on the left side of your screen).



6. **Right-click** your new **Contact Folder**

7. Select **Properties** from the menu.



8. Click the **Outlook Address Book** tab in the Properties dialogue box.

9. Click check box to select **Show this folder as an e-mail Address Book**.

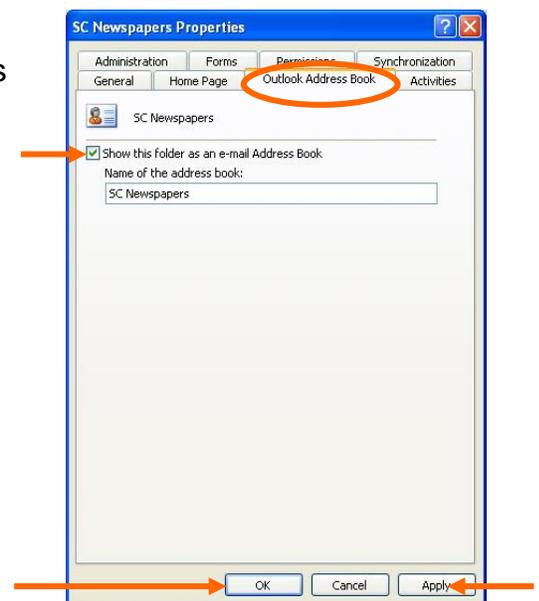
(This check box may already be selected).

10. Click **Apply** button

11. Click **OK** button.

12.

You'll be returned to your contact folder.



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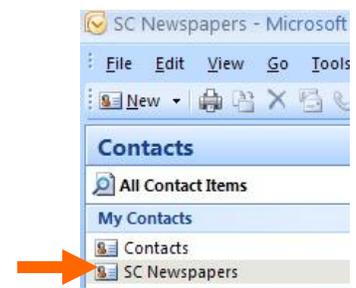
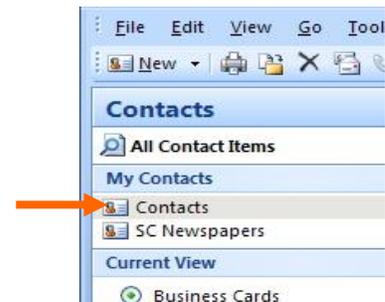
Moving Contacts to your New Contact Folder.

Contacts that currently exist in your **main Outlook Contacts List** can be **moved** or **copied** to your **new Contact Folder**.

GroupWise e-mail addresses that you saved prior to our conversion to Outlook e-mail must be converted to Outlook Contacts and can then be added to any Contact Folders that you create. See instructions at the bottom of page 6.

Moving 1 Contact

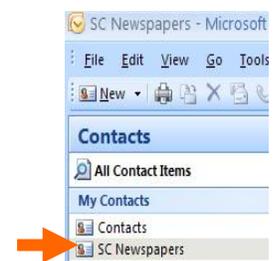
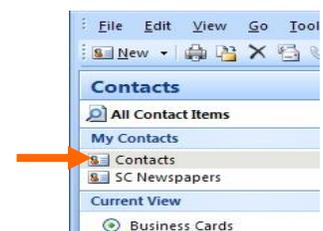
1. Click **Contacts** in your Contacts Folder List.
A listing of all your Outlook contacts will display.
2. Select a desired contact and **drag** it to the **new contact folder**.
The selected contact will be dropped into the new contact folder.
3. Click the new Contact Folder to display it's contacts.



Moving Several Contacts

1. Click **Contacts** in your Contacts Folder List.
A listing of all your Outlook contacts will display.
2. Click once to select the **first** desired contact.
3. While holding down the **Ctrl key**, **click once** on the **next** desired contact to select it.
4. Repeat step 3 to select each additional contact.
5. When done selecting contacts, **drag** selected contacts to the **new contact folder**.

The selected contacts will be dropped into the new contact folder.



Click the new Contact Folder to verify it's content.

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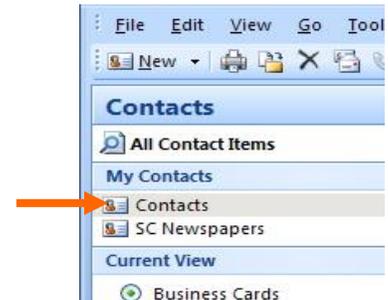
Copying Contacts to your New Contact Folder.

Contacts that currently exist in your **main Outlook Contacts List** can be **moved** or **copied** to your **new Contact Folder**.

GroupWise e-mail addresses that you saved prior to our conversion to Outlook e-mail must be converted to Outlook Contacts and can then be added to any Contact Folders that you create. See instructions at the bottom of page 6.

Copying 1 or Multiple Contacts

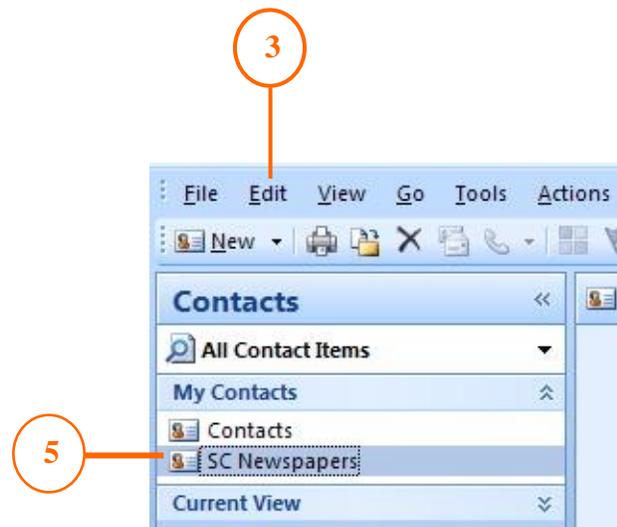
1. Click **Contacts** in your Contacts Folder List.
A listing of all your Outlook contacts will display.



2. To **select One Contact**, click once on a contact **or**
To **select multiple contacts**, hold down the **Ctrl key** and **click once** on each desired contact.

Contact(s) will become selected.

3. Click **Edit** on the toolbar
4. Click **Copy**.
5. **Click** on the desired Contact Folder.
6. Click **Edit** on the toolbar
7. Click **Paste**.



The selected contacts will be copied into the new contact folder.

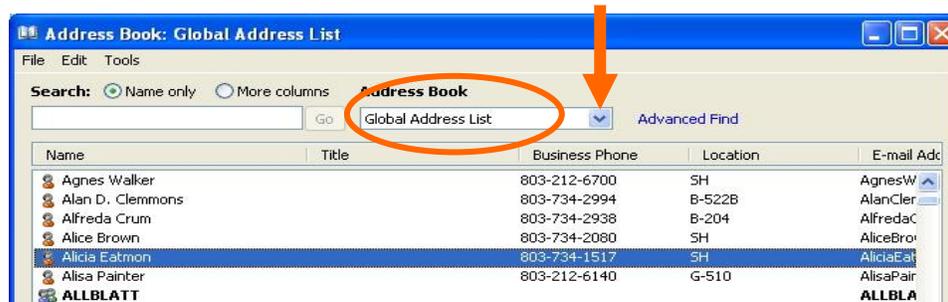
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Sending E-mail Messages Using Contact Folders

1. Create a new e-mail message.
2. Click the **To:** button.
The Outlook Global Address List will open.



3. Click the drop-down arrow next to **Global Address List**



Double-click your desired **Contact folder**

Located below **Outlook Address Book** in the listing.

The Contact Folder will open displaying it's contacts.

To Select Individual Contacts



1. **Double-click** the name of **each contact** that you'd like to send e-mail to.
2. Contact names will be added in the **To:** field *(at the bottom of the window)* as you select them.

To select all the Contacts in a Contact Folder

1. **Click once** to select the **first** contact in your Contact Folder.
2. While holding down the **Shift key**, **click once** on the **last** contact in the listing.
All contact names will become selected.

3. Click the **To:** button *(at the bottom of the window.)*

Contact names will be added in the **To:** field

4. Complete e-mail as normal and **Send**.

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Deleting a Contact Folder

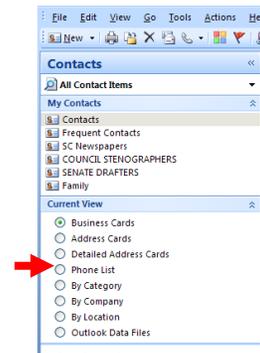
1. Open Outlook and click **Contacts** in Outlook Navigation bar
To display a listing of all your Outlook contacts.
2. In the Contacts Folder List, click once to select the **Contacts Folder** to be deleted.
3. **Right-click**, then click **Delete** from the menu.
4. Click **Yes** to confirm folder deletion.

Changing the Way You View Your Contacts

You can quickly change the way you view your Contacts by clicking any of the predefined view shortcuts that appear in the Navigation bar on the left side of the window.

The default view for contact is called “**Business Cards**”

1. Click any of the additional view options to change the way contacts are displayed.



Converting a GroupWise E-Mail Address to an Outlook Contact

Before we converted to Outlook, LPITS requested that users save any GroupWise **e-mail addresses** that they wanted to keep in their personal address book. In GroupWise, this folder was designated by the user's full name. LPITS, in turn, saved this information to a folder within the Outlook Global Address List designated by the user's full name - *like Charles Doe*. These **saved GroupWise e-mail addresses can be converted to Outlook contacts** and can then be added to Outlook Contact Folders.

Here's how. . .

1. **Open** Outlook.
2. Click the **Address Book** icon

or

Click **Tools** (on the menu bar) and select **Address Book** from the dropdown menu.

The Outlook Global Address List dialogue box will open displaying Network Staff names and e-mail addresses.

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3. Click the drop-down arrow next to **Global Address List**
4. Select the folder that displays your full name.

Saved GroupWise Names and e-mail addresses will be displayed.

A 'full-name folder' will not be listed for those users who did not to save any GroupWise e-mail addresses before the conversion to Outlook.



5. **Select** a GroupWise e-mail address that you'd like to convert.
6. **Right-click** and click "**Add to Contacts**" from the menu.
7. You'll be placed inside a new Outlook Contact information window.

All former GroupWise contact information will be displayed.

8. You can add any new Contact information is you desire.



9. Click **SAVE & CLOSE** on the ribbon to save the contact's information.

The contact information will be automatically saved to your main Outlook Contacts List.

10. Repeat steps 3-9 (above) to convert additional GroupWise e-mail addresses to Outlook contacts.
11. Follow instructions in this handout (page 3 or page 4) to **Copy** or **Move** converted Contact(s) to the Contact Folder of your choice.