Outlook® TIPS, TRICKS & TECHNIQUES

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Outline

Email Features

- Adding contacts using email messages
- Creating distribution lists
- Using stationery
- Creating a signature
- Adding names to the Blocked and Safe Sender lists
- Changing security settings in Outlook®

Organizing Outlook

- Color-coding email messages
- Using the Advanced Find feature
- Creating rules
- Updating your contacts with vCards
- Assigning categories to your contacts
- Creating a custom view
- Using grouped views

Maximizing the Calendar Function

- Converting tasks to appointments
- Setting reminders
- Color-coding your appointments
- Scheduling an event
- Changing calendar views

Adding Contacts Using Email Messages

Use an inbox message or a message in another folder to add a sender's name and email address to your Contacts list.

1. Select the Mail option in the navigation pane and navigate to the target message



2. Hover over the name of the sender (Tom Carpenter of SysEdCo in the following image)



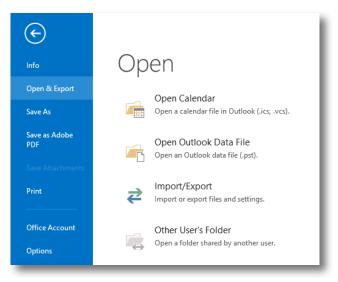
- 3. Click the down arrow in the box that appears and then click the Add link
- 4. Enter the information you desire for the contact form the email source data using copy-and-paste procedures

Name Tom Carpenter of	SysEdCo <sysedco@yahoo.com></sysedco@yahoo.com>	×
CONTACT NOTES		
⊕Email	⊕Work	
Email	0.4.11	
sysedco@yahoo.com	Address	
(+) Phone	⊕ Birthday	
€IM		
	Save Cancel	

Email Features

Other methods of adding contacts include importing contacts from an external data source:

- 1. Click the **File** tab to access Office Backstage
- 2. Select the **Open & Export** page
- 3. Choose the **Import/Export** option



Setting the Send Message Options

	Outlook Options ? ×
General	Send messages
Mail	Default Importance level: 🨾 Normal 🗸
Calendar	Default Se <u>n</u> sitivity level: Normal V
People	Mark messages as expired after this many days: 0
Tasks	Always use the default account when composing new messages
Search	Commas can be used to separate multiple message recipients
Language	✓ Automatic name checking
	Delete meeting requests and notifications from Inbox after responding
Advanced	✓ CTRL + ENTER sends a message
Customize Ribbon	✓ Use Auto-Complete List to suggest names when typing in the To, Cc, and Bcc lines
Quick Access Toolbar	\checkmark Warn me when I send a message that may be missing an attachment
Add-Ins	Tracking
Trust Center	
	Delivery and read receipts help provide confirmation that messages were successfully received. Not all e-mail servers and applications support sending receipts.
	For all messages sent, request:
	Delivery receipt confirming the message was delivered to the recipient's e-mail server
	<u>Read receipt confirming the recipient viewed the message</u>
	For any message received that includes a read receipt request:
	Always send a read receipt
	O Never send a read receipt
	Ask each time whether to send a read receipt
	Automatically process meeting requests and responses to meeting requests and polls
	Automatically update original sent item with receipt information
	Update tracking information, and then delete responses that don't contain comments
	After updating tracking information, move receipt to:
	OK Cancel
	1. 1.

	columns Address Book Go Contacts - training@	tomcarpenter.net (1) V Advanced Find
Name	Display Name	E-mail Address
Tom Carpenter of SysEdCo	Tom Carpenter of SysEdCo Tom Carpenter of SysEdCo (to	sysedco@yahoo.com
c .		
To ->		>
		>

Sending Carbon Copies (CCs) and Blind Carbon Copies (BCCs)

Voting Options

	Properties	×					
Settings	Security Change security settings for this message.	-					
Sensitivity Normal	✓ Security Settings						
Do not AutoArchive this Voting and Tracking options	is item	_					
Use voting buttons		2					
Delivery options		-					
💁 🗌 Have replies sent to	Select Names						
Do not deliver before	None 🗸 12:00 AM 🗸						
Expires after	None 🗸 12:00 AM 🗸						
Save copy of sent messa	Save copy of sent message						
Contacts							
Cate <u>g</u> ories ▼ None							

Attachments

FILE MESSAGE INSERT OPTIONS FORMAT TEXT REVIEW ADOBE PDF Paste Copy Calibri (Bor 11 * A* A*) A* 1 = + 1 = + 1 + 2 + 2 + 2 + 2 + 2 + 2 + 2 + 2 + 2	E 🖓 5 0 🕆 4 🗧 Untitled - Message (HTML)	?	不	_	×
Paste Copy Paste Format Painter Clipboard rs Basic Text rs Names 1 You added voting buttons to this message. To Send Subject	FILE MESSAGE INSERT OPTIONS FORMAT TEXT REVIEW ADOBE PDF				
You added voting buttons to this message. To To Cc Send Subject	Paste v ✓ Format Painter B I U V · A · E = = ← ← Address Check Attach Attach Signature v ✓ Format Painter B I U V · A · E = = ← ← Address Check Attach Attach Signature V Low Importance				
	You added voting buttons to this message. To To Cc Send Subject	Zoom			

Creating a Contact Group

A distribution list, now called a contact group in Outlook[®] 2010 and later, including 2013, allows you to make one entry in order to send mail to a group of people.

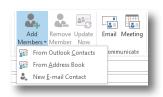
- Click the **People** selection in the left navigation panel or press **Ctrl+3** (NOTE: Pressing Ctrl+1 goes to **Mail**.)
- 2. Click the New Contact Group button on the Home tab of the ribbon



3. Enter a name for the Contact Group in the **Name** field as shown here:

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Save &	Delete Forward Group Group * Actions				Categorize Follow Private	Q Zoom	^
Name	Project B47	SHOW	Members	Communicate	Tags	Zoom	
🗋 Nan	ne 🔺			E-mail			
We didn't find anything to show here.							
In Folde	er 🔠 Contacts						

 Click the Add Members button on the Contact Group tab of the ribbon and select From Outlook Contacts, From Address Book or New E-mail Contact according to your needs

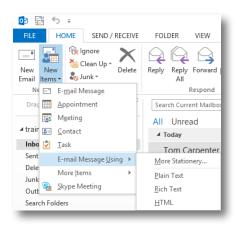


5. Click the Save & Close button on the Contact Group tab of the ribbon

Using Stationery

Use stationery to change the look of your emails, but remember that some email applications cannot display stationery so there is no guarantee your email will be seen as intended.

 Begin creating a new email message by navigating to the Mail section on the left navigation panel (or pressing Ctrl+1) and then choosing New Items > E-mail Message Using > More Stationery on the Home tab of the ribbon bar



2. In the **Theme or Stationery** dialog box, select the desired theme and features and then click **OK**

	Theme or Stationery ? ×
Choose a <u>T</u> heme: S	ample of theme Blueprint:
Choose a Ineme: S (No Theme) Artitic Artitic Artitic Artitic Artitic Artitic Artitic Artitic Artitic Artitic Artitic Artitic Artitic Artitic Bilends Carsuales Carsuales Carsuales Carsuales Carsuales Correrete Currency (Stationery) Deep Bilen Echos Eclipse Edge Expedition Garden (Stationery) Vivid Colors Vivid Colors M Active Graphics Bileckground Image	Heading 1 style Bullet 1 Bullet 2 Bullet 3 Horizontal Line: Heading 2 style Regular Text Sample Regular Hyperlink Followed Hyperlink

3. Compose and send the desired email message

Creating a Signature

A signature allows uniformity of contact information within every email message you compose.

1. Click the File tab and select Options



- 2. In the Outlook Options dialog box, select the Mail page
- 3. Click the Signatures button
- 4. Click the **New** button and provide a name for the signature
- 5. Enter the desired information to be used in your signature using the **Edit Signature** section
- 6. Ensure that the proper settings are configured for **E-mail Account**, **New Messages** and **Replies/Forwards**, then click **OK**

Signatur	es and Stationery ? ×
E-mail Signature Personal Stationery	
Sele <u>c</u> t signature to edit	Choose default signature
Default	E-mail account: training@tomcarpenter.net (1)
	New messages: (none)
	Replies/forwards: (none)
Delete New Save Renar	ne
Edi <u>t</u> signature	
Calibri (Body) V 11 V B I U Autom	atic 🔽 🚍 🚍 🔠 <u>B</u> usiness Card 📑 🔂
	^
Tom Carpenter training@tomcarpenter.net	
937-555-1234	
	•
	OK Cancel

Using the Automatic Spell Check

Credibility is essential to good communication. Using automatic spell check can save you from embarrassing typos that result in the loss of credibility. To ensure automatic spell check is enabled:

- 1. Click the File tab on the ribbon and choose Options
- 2. In the Outlook Options dialog box, select the Mail page
- 3. Check the **Always check spelling before sending option**, if you desire to have it enabled

ABC	✓ <u>A</u> lways check spelling before sending	Spelling and Autocorrect
•	Ignore original message text in reply or forward	

4. Click the Spelling and AutoCorrect button and then configure settings as desired

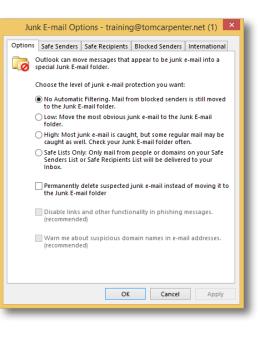
	Editor Options	?	×
Proofing Advanced	ABC Specify how Outlook corrects and formats the contents of your e-mails.		
	AutoCorrect options		
	Specify how Outlook corrects and formats text as you type. AutoCorrect Options		
	When correcting spelling in Microsoft Office programs		
	Ignore words in UPPERCASE Jonore words that contain numbers Jonore Internet and file addresses Flag repeated words Enforce accented uppercase in French Suggest from main dictionary only Custom Dictionaries French modes: Traditional and new spellings v Spanish modes: Tuteo verb forms only v		
	When correcting spelling in Outlook Image: Check sgelling as you type Image: Check sgelling as you type Image: Check sgelling as the state of the state		
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Adding Names to the Blocked and Safe Sender Lists

Spam is a common problem for email users; however, not receiving important messages because they are flagged as spam is an equally troubling problem. You can configure specific email senders to be blocked or allowed by the Outlook[®] spam engine.

- 1. Select the **Mail** section in the left-hand navigation panel
- 2. Right-click on a message you wish to mark as spam and choose **Junk > Block Sender**
- 3. Right-click on a message you wish to mark as not spam and choose **Junk > Never Block Sender**

You can also manage these settings globally by selecting Junk > Junk E-mail Options on the Home tab in the Delete group.



Changing Security Settings in Outlook®

Phishing attacks, social engineering and email tracking are all "attack" methods that can be performed by unethical attackers against email users. Phishing attacks are used to get information from you that you should not provide—they are prevented through awareness of these attack methods and simply not responding. Social engineering attacks are similar, except they strictly involve human social manipulation and phishing attacks will add the concept of legitimacy through the use of well-known brand logos, twin Web sites and such. Email tracking is performed by embedding images in emails that are actually stored on Web servers. When the image is displayed in the email, the attacker receives a hit on the Web server and now knows the email is a valid target with a real user on the other end.

To assist in addressing such issues and others, Outlook provides security settings, which can be configured in the **Trust Center**. Access it by selecting the **File** tab and choosing **Options**. Then select the **Trust Center** page from the left navigation panel.

	Outlook Options ?	×
General Mail	Help keep your documents safe and your computer secure and healthy.	
Calendar	Protecting your privacy	
People Tasks	Microsoft cares about your privacy. For more information about how Microsoft Outlook helps to protect your pri please see the privacy statements.	ivacy,
Search	Show the Microsoft Outlook privacy statement Security & more	
Language Advanced	Visit Office.com to learn more about protecting your privacy and security.	
Customize Ribbon Ouick Access Toolbar	Microsoft Trustworthy Computing	
Add-Ins	Microsoft Outlook Trust Center The Trust Center contains security and privacy settings. These settings help keep your Trust Center Setting	95
Trust Center	computer secure. We recommend that you do not change these settings.	gs
]	ОК Са	ancel

Color-coding Email Messages

Versions of Outlook[®] before 2010 had the **Organize** feature, which was used to automatically create formatting rules. Outlook 2010 and later versions no longer include this feature, and **Conditional Formatting** rules must be created manually to perform the same function.

- 1. When in the Mail section, select the View tab on the ribbon
- 2. Click the View Settings button in the Current View group



- 3. In the Advanced View Settings dialog box, click the Conditional Formatting button
- 4. In the Conditional Formatting dialog box, click the Add button to add a new condition
- 5. Enter a title that is meaningful to you in the Name field
- 6. Click the **Condition** button to select the appropriate condition. When finished, click **OK**.
- 7. Click the Font button to set the formatting for the condition. When finished, click OK.
- 8. Click **OK** to save the new condition



9. Click **OK** again in the **Advanced View Settings** dialog box to apply the new condition to the current view

NOTE: You can click the **Reset View** button on the **View** tab of the ribbon at any time to revert the view to the default configuration, including the removal of all conditional formats you've created.

Creating Rules

Rules are applied when messages arrive in your inbox or when messages are sent. Rules can be created in several ways:

- Right-click an email and choose **Rules > Create Rule**
- Click on an email and choose **Rules > Create Rule** from the **Home** tab on the ribbon
- On the Home tab of the ribbon, choose Rules > Manage Rules and Alerts

Rules and Alerts		×
E-mail Rules Manage Alerts		
💼 New Rule Change Rule 🗸 🖹 Copy 🗙 Delete 🔺 💌	Run Rules Now Options	
Rule (applied in the order shown)	Actions	^
Select the "New Rule" button to make a	rule.	
		\sim
Dula descistion (diale en un desline due lus te edit).		
Rule description (click an underlined value to edit):		
Enable rules on all messages downloaded from RSS Feeds		
	OK Cancel A	pply
		_

Using the Advanced Find Feature

Before Outlook[®] 2010, you could access an **Advanced Find** function from the search **Options** menu. Outlook 2010 and later, including 2013, lack this feature; however, you can access the **Advanced Find** search dialog box using the shortcut **Ctrl+Shift+F**.

⁸ =>	Advanced Find	– 🗆 🗙		
Loo <u>k</u> Messages	V In: Inbox	<u>B</u> rowse		
Messages More Choice	s Advanced	Find <u>N</u> ow		
Search for the word(s):	V	Sto <u>p</u>		
<u>I</u> n:	subject field only	New <u>S</u> earch		
F <u>r</u> om				
Sent T <u>o</u>				
<u>W</u> here I am:	the only person on the To line 🗸 🗸	Q		
Ti <u>m</u> e:	Time: none V Anytime V			

5		Messages: Containing computerworld - Advanced Find	– 🗆 ×
Loo <u>k</u>	Messages	v In: Inbox	<u>B</u> rowse
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	<u>I</u> n:	frequently-used text fields	New <u>S</u> earch
	F <u>r</u> om Sent T <u>o</u>		
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		ps for speeding up your business Wi-Fi Wed 4/ 75 D Inbox p makers lay groundwork for faster and smarter data center switches	►
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		y reminds us all what a pathetically Tue 4/2 33 Inbox rld Security: April 21, 2015	►
		ble's new Retina MacBook is 'repair n Mon 4/ 69 Dibox n't expect to buy an Apple Watch in stores before June	►
		tt on the Office expansion list: Windo Mon 4/ 76 Inbox ny introduces new flagship Xperia Z4 smartphone	▶ ▼

Updating Your Contacts With vCards

When a message in the inbox contains a vCard attached, it's easy to access information about the sender and add it to your **Contacts/People** in just a couple of clicks.

- 1. Double-click on the email attachment and choose **Open** in the Opening Mail Attachment dialog box
- 2. Review the Contacts dialog box
- 3. Click Save and Close

E E ち ♂ ↑ ↓ ⇒	Tom Carpenter of SysEdCo - Contact ? 📧 🗕 🗖 🗙
FILE CONTACT INSERT FORMAT TEXT REVIEW	
	Address Check Business Picture Book Names Options Tags Zoom
Full Name fom Carpenter of SysEdCo Company	Tom Carpenter of SysEdCo (937) 555-1234 Work sysedo @yahoo.com tom.carpente@tom.carpenter.net 47 Some Road Some City, OH 43015
E-mail v	Notes
Display as Tom Carpenter of SysEdCo (sysedco@yahoo.com)	noits
Web page address	
IM address	
Phone numbers	
Business v (937) 555-1234	
Home v	
Business Fax 👻	
Mobile 👻	
Addresses	
Business + 47 Some Road Some City, OH 43015	
In Folder I Contacts	
See more about Tom Carpenter of SysEdCo.	<u> </u>

Creating a Custom View

Custom views allow you to change the appearance of view contents, including:

- Filters
- Conditional formats
- Columns
- Groupings
- Sorting method

To create a custom view:

- 1. Select the **Mail** or **Calendar** section from the left navigation panel
- 2. Click the View tab on the ribbon
- 3. Select the **Change View** button in the **Current View** group and then select **Manage Views**



4. In the **Manage All Views** dialog box, click either **New** to create a view from scratch or **Copy** to copy an existing view and alter its settings as a new view

	Can Be Used On	View Type	~	New
Current view settings>	All Mail and Post folders	Table		
ompact	All Mail and Post folders	Table		Copy
ingle	All Mail and Post folders	Table		
review	All Mail and Post folders	Table		Modify
				Rename
				Reset
Description			×	
Description Fields:	Importance, Reminder, Ico	n, Attachment, F	rom, S	iubject, Recei
	Importance, Reminder, Ico Arrangement Label (descer	· · ·	From, S	ubject, Recei
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Fields: Group By:	Arrangement Label (descer	· · ·	From, S	iubject, Recei

- Provide a name for the view in the Name of New View field on the Copy View dialog box and click OK
- 6. In the **Advanced View Settings** dialog box, select the items you wish to customize and modify them, then click **OK** to save the new view

Advanced View Settings: My View						
Description						
Importance, Reminder, Icon, Flag Status, Attachment, Fr						
None						
Sort Received (descending)						
Eilter Off						
Other Settings Fonts and other Table View settings						
User defined fonts on each message						
Specify the display formats for each field						
Reset Current View OK Cancel						

Using Grouped Views

Groups allow you to organize items in a table (a view) into a grouped outline, which you can then expand or collapse to display or hide the items they contain.

- Select the Single view from the Change View button on the View tab of the ribbon.
- 2. Click the **View Setting**s button and then click the **Group By** button.
- 3. Deselect Automatically group according to arrangement and click OK. Click OK again.
- 4. Right-click on a column heading and select **Group By Box**.
- Drag columns by which you wish to sort into the area labeled Drag a column header here to group by that column to get results similar to the following.

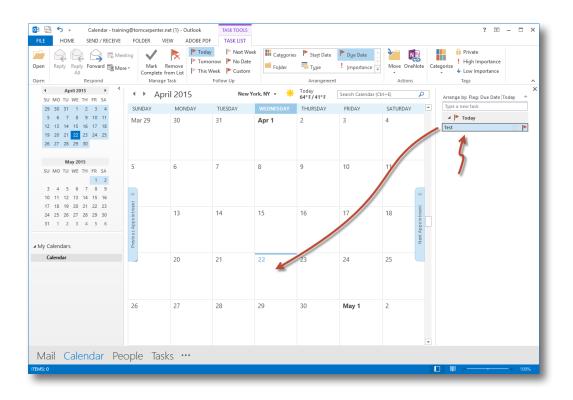
roup items by		Cancel
(none)	Ascending	cancer
Show field in view	Descending	Clear All
Then by		
(none)	Ascending	
Show field in view	Oescending	
Then by		
(none)	Ascending	
Show field in view	Descending	
Then by		
(none)	Ascending	
Show field in view	Oescending	

All Unread Search Current Mailbox (Ctrl+E) Received		P Current	Mailbox •	-
☆ □ 0 FROM SUBJECT	SIZE	CATEGORIES	8	
Received: Wednesday, April 22, 2015 8:31 AM: 1 item(s)				
🕖 Tom Carp Tom Carpenter of SysEdCo	18 KB		 	
Received: Wednesday, April 22, 2015 8:02 AM: 1 item(s)				
Tom Carp Test Message for Contact This is a test. Tom Carpenter	8 KB		▶	
A Received: Wednesday, April 22, 2015 6:51 AM: 1 item(s)				
Computer Apple's OS X 'Rootpipe' patch flops, fails to fix flaw Computerworld Security: April 22, 2015	36 KB		▶	
A Received: Wednesday, April 22, 2015 6:22 AM: 1 item(s), 1 unread				

Converting Tasks to Appointments

Sometimes an item in a task list evolves into an appointment, and you can convert such a task.

- 1. Select the Calendar view
- 2. Choose the View tab
- 3. In the Layout group, choose To-Do Bar > Tasks
- 4. Drag a desired task to the calendar location where it should be placed as an appointment



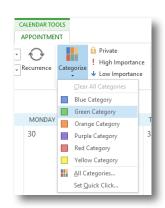
Setting Reminders

Reminders can help make sure that no future appointments are forgotten.

- If you want Outlook[®] to give you a reminder that a task or appointment is due, make certain the **Reminder** check box is selected in the settings dialog box for the task or appointment
- 2. Choose the reminder value, which is a time expressed in length before the scheduled task or appointment at which Outlook should alert you

Image: Image	? 🗈 — 🗆 🗙
FILE EVENT INSERT FORMAT TEXT REVIEW	
Save & Delete Copy to My Coperation of Appointment Scheduling Skype Meeting Notes Alterdees # Remind Notes Alterdees # Remind Notes Alterdees # Remind Notes Alterdees # Remind Notes # Re	s: Free Q Infer: None Recurrence Time Categorize I High Importance Zoom
Actions Show Skype Meeting Meeting Notes Attendees	None Tags Zoom A
Subject	0 minutes
Location	10 minutes
Start time Tue 4/21/2015 12:00 AM	15 minutes
	30 minutes
End time Tue 4/21/2015 12:00 AM +	1 hour 2 hours
	3 hours
	4 hours
	5 hours
	6 hours
	7 hours
	8 hours 9 hours
	9 hours 10 hours
	11 hours
	0.5 days
	18 hours
	1 day
	2 days
	3 days
	4 days
	1 week
	2 weeks

Color-coding Your Appointments



You can use categories and their associated colors to color-code your appointments in the Day, Work Week or Month view of your calendar.

- 1. Click the Calendar item to be configured
- 2. On the **Calendar Tool**s tab of the ribbon, select the **Categorize** button
- 3. Select the desired category, which applies the desired color

NOTE: You can select **All Categories** to edit category names and colors.

Scheduling an Event

Events are all-day activities in Outlook[®], whereas appointments typically have a limited duration during the day. Appointments are activities that typically do not involve other people. Meetings are activities that do involve other people. Events may or may not involve other people, but they consume the entire day on the calendar.

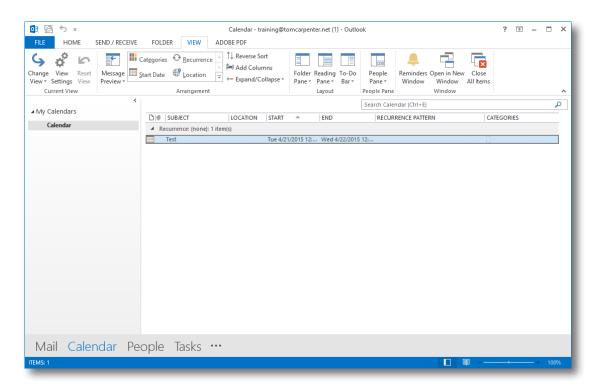
 In the Appointment window, click the All day event check box to convert an appointment to an event

FILE	S C ² ↑ ↓ ∓ Test-Event ? Image: Test-Event EVENT INSERT FORMATTEXT REVIEW											
? >	ete Copy to My G Forward - Calendar		g Skype Meeting	Meeting Notes	Invite Attendees	Show As: Free	+ Recurrence	Cones	Categorize	 Private High Importance Low Importance 	Zoom	
	Actions	Show	Skype Meeting	Meeting Notes	Attendees	Options	s			Tags	Zoom	~
Subject	Test											
Location												-
Start time	Tue 4/21/2015	12:00 AM	 All day eve 	nt								
End time	Tue 4/21/2015	12:00 AM	-									

Changing Calendar Views

Outlook[®] provides many ways to view the Calendar. The List view shows the current year's activities on a schedule.

1. Click Change View on the View tab of the ribbon and select List



BONUS MATERIALS: HANDY DESK REFERENCE TO THE TOP FEATURES OF OUTLOOK®

General Outlook Shortcuts

Description	Shortcut
Send message	Ctrl+Enter or Alt+S
Reformat an email message from RTF to plain text	Ctrl+Shift+O
Delete message from message window	Ctrl+D
New Contact Dialog	Ctrl+Shift+C
New Office Document	Ctrl+Shift+H
Read Warning Header	Ctrl+Insert+W
Save non-email item in current folder	Alt+S
Cancel the current operation	Escape Key
Move up current level of treeview	Up Arrow
Move down current level of treeview	Down Arrow
Collapse current branch of treeview	Left Arrow
Expand current branch of treeview	Right Arrow
Launch Go-To Folder dialog	Ctrl+Y
Save unfinished item in Drafts folder	Ctrl+S
Move selected item to Deleted Items folder	Delete Key
Open Print dialog box	Ctrl+P
Delete current item	Ctrl+D
Mark as unread or read	Ctrl+Q
Select all	Ctrl+A
Copy highlighted items/text to clipboard	Ctrl+C
Cut highlighted items/text to clipboard	Ctrl+X
Paste items/text from clipboard	Ctrl+V
Open application menu (to maximize, minimize, etc.)	Alt+Spacebar
Create new item	Ctrl+N

Description	Shortcut
Undo	Ctrl+Z
Move cursor to top of email list	Home
Move cursor to end of email list	End
Move edit cursor to top in new email message window	Ctrl+Home
Move edit cursor to end in new email message window	Ctrl+End
Check Names	Ctrl+K
Move cursor to Menu bar	Alt+ or F10
Launch Advanced Find	Ctrl+Shift+F or F3
Move to next window pane	F6
Launch Spell Checker	F7
Move directly to Inbox	Ctrl+Shift+I
Move directly to Outbox	Ctrl+Shift+O
Copy selected item(s) to a folder	Ctrl+Shift+Y
Create new folder dialog	Ctrl+Shift+E
Move selected item to folder	Ctrl+Shift+V
Create a new email message	Ctrl+Shift+M
Create a new appointment item	Ctrl+Shift+A
Create a new contact item	Ctrl+Shift+C
Create a new task item	Ctrl+Shift+K
Create a new note item	Ctrl+Shift+N
Message options (from a new message window)	Alt+P
Open Address Book	Ctrl+Shift+B
Launch Flag for Follow-up dialog box	Ctrl+Shift+G
Reply to sender	Ctrl+R
Reply to all	Ctrl+Shift+R
Forward message	Ctrl+F

In Calendar Week View

Description	Shortcut
Go to today's date	Alt+D
Go to a date	Ctrl+G
Move to next date	Down Arrow
Move forward one week	Page Down
Move backward one week	Page Up
Move to appointments on current date	Tab (hit Enter twice to open item)

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