

Course Manual:

OUTLOOK
Advanced



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OUTLOOK ADVANCED

↳ Plan & Objectives

- | | |
|---------------------------------------|----------------------------|
| * Set up an account | * Calendar Sharing |
| * Display Management | * Contact Management |
| * Filing Management | * Rules and Log Management |
| * Working with and creating templates | * RSS FEED |

↳ Set up an account

When you open Outlook for the first time, you'll need to set up your account. Usually, the technician does this.

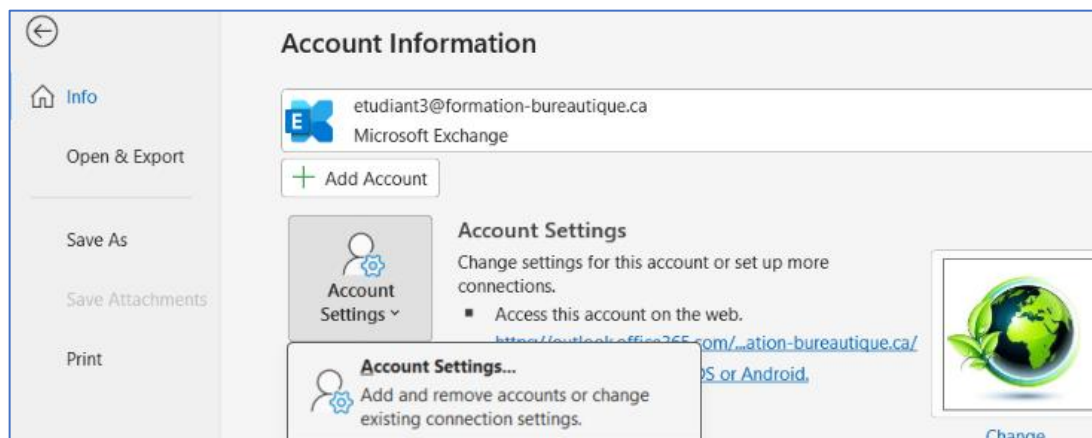
When it's a GMAIL or Yahoo or Outlook account, the internet will be of great help, type "**Gmail Setup in Outlook**" and follow the steps.

Inbound and outbound servers should be there. I must admit that in general, we call either Sympatico or Videotron for this kind of information because of the passwords.

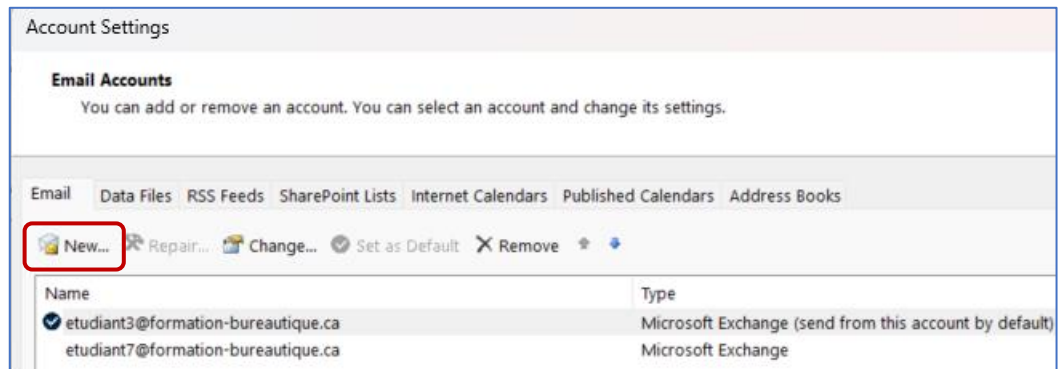
Email configuration does not necessarily mean "**Import with Calendar**".

We will see a little later in the document, how to import (for example) a GMAIL calendar, the appointments will register in GMAIL and will be updated in Outlook.

- * Click File, click Account Settings, and then click Account Settings...



- * Click on **New...**



- * Enter the Email address

Email address

- * When the address is part of the same organization, you can choose:



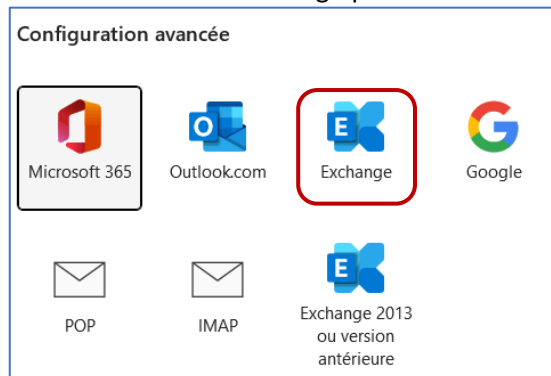
- * If it's a different email address, click on Advanced **Options** and check the box **Let me set up my account manually**

Advanced options ^

☐ Let me set up my account manually

- * Click on **Connect**

- * Choose from the following options:



What is POP and IMAP?

- * IMAP allows you to store messages on the server and access them on all your devices whenever you want.
- * The POP protocol allows you to delete messages and attachments from the server once you have received them on your device.

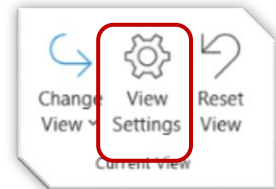
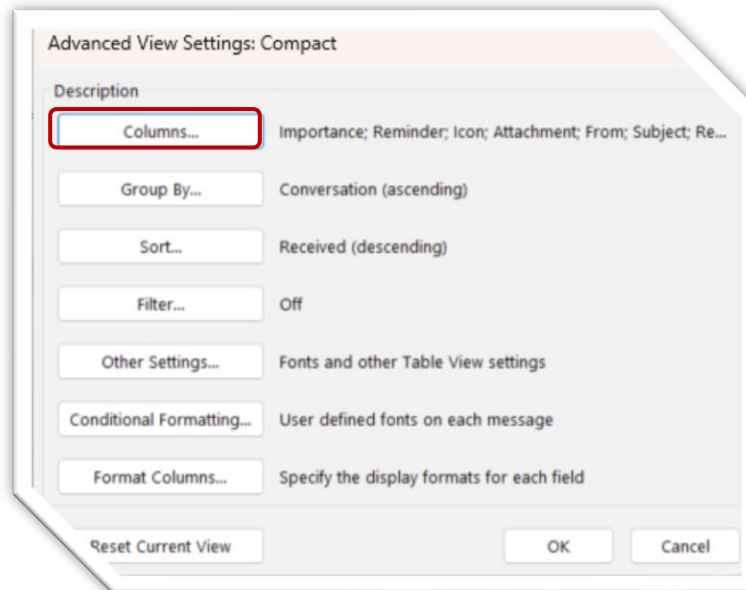
What's the difference between Outlook and Exchange?

- * While the two apps work together, Microsoft Exchange provides the background for a centralized system for your emails, messages, calendars, and tasks, while Outlook is a desktop email client that stays in sync with the Exchange server.

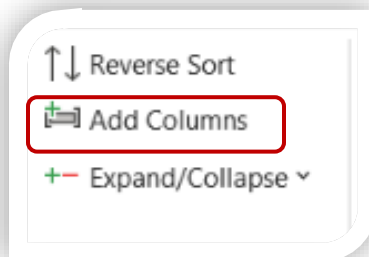
→ Customize the layout

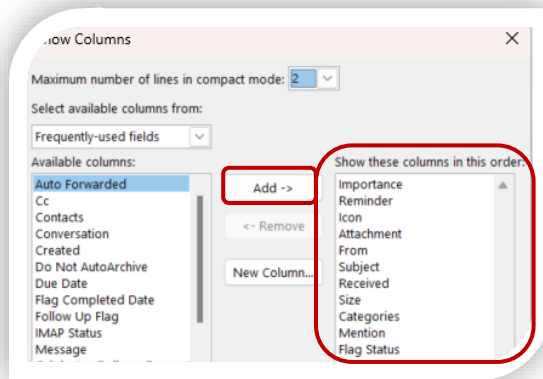
Add, remove, or move a column

- * On the **View** tab, in the **Current View** group, click **View Settings**.

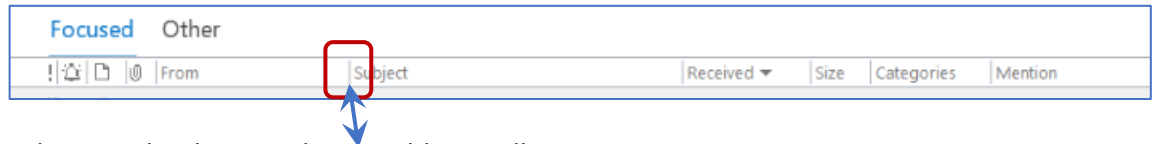


- * Click Columns
- * Or click "Add Columns" in the **Arrangement** group



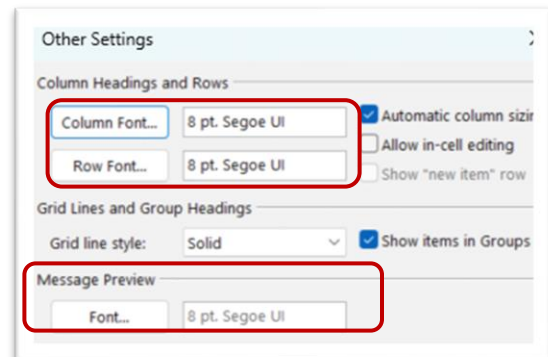
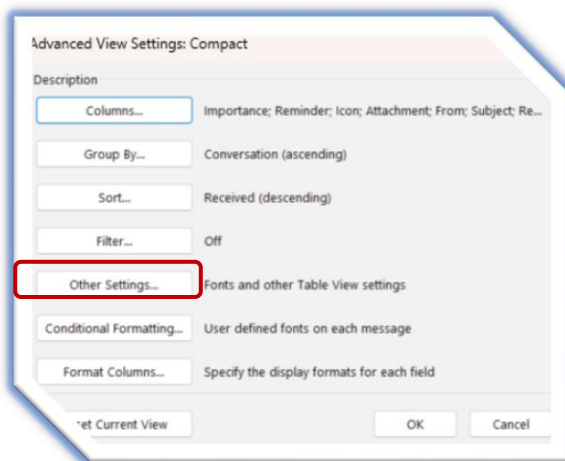


- * Add missing columns as needed

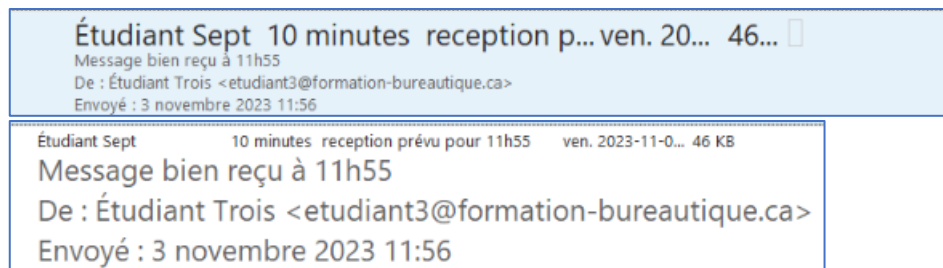


- * Enlarge or shrink your column width as well

Other settings to change the font of lines and columns



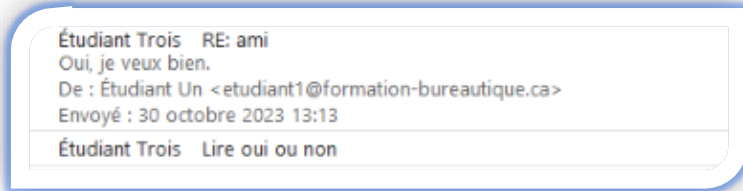
- * Click Column or Row Font and increase the font size



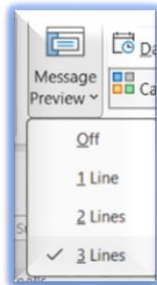
Change Message Preview

By default, in the preview of a message, we only see the first line of the email.

It is possible to display up to 3 lines of your email.



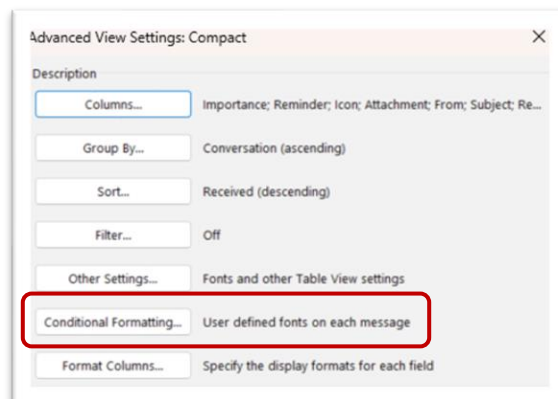
- * Click the View tab, Arrangement group, Message Preview
- * Check the number of rows you want.



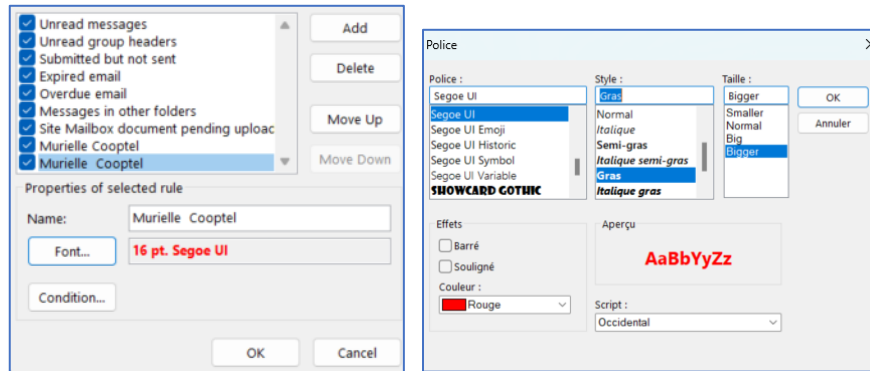
➔ Conditional formatting

Display certain messages with conditions in color

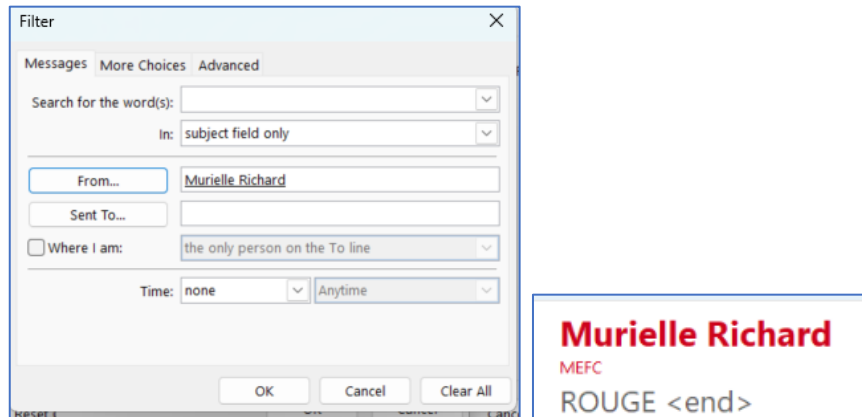
1. Click **View Settings**, located on the **View** tab
2. Click **Conditional Formatting**



3. Click **Add**



4. Type a name for the rule.
5. Click **Font**.
6. Change the **color**, **size**, and **font** of your choice
7. Click **OK**.
8. Click **Condition**.
9. In Condition, enter the name of the contact " **From...** »



10. Click **OK**

There are several conditional formatting options that can be created:

- ↪ With words ↪ Email read or unread
- ↪ By importance ↪ Attachments

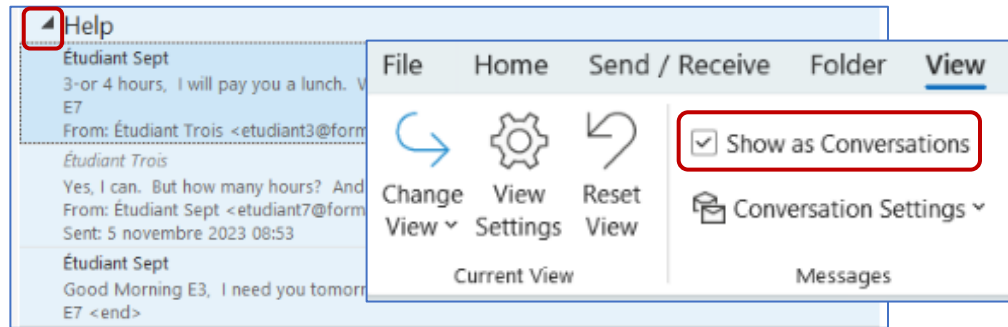


The important thing is to get your attention

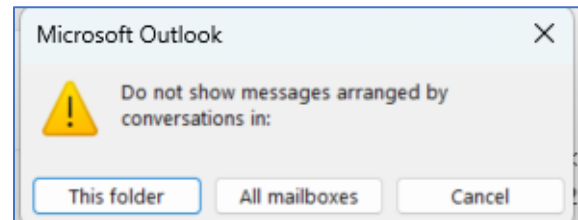
→ Conversation mode

Conversation mode will be used to group messages in a conversation, messages that share the same subject and are grouped together in the message list.

Click **Expand** or **collapse** located to the left of the conversation header.



- * Messages are sorted with the most recent above. The new message received will be at the top of the message list.
- * On the View tab, select or clear the **Show as conversations check box**
- * Choose This Folder or All Mailboxes



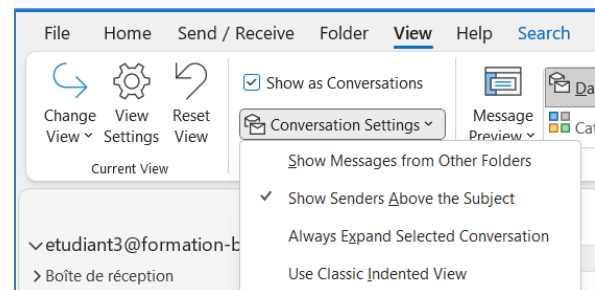
Conversation Settings to change the options as needed.

Show Messages from Other Folders

Use this option to view messages in the conversation that have been moved to other folders, as well as messages that you have sent that are stored in your Sent Items folder.

Show Senders Above the Subject

This option displays the names of the senders at the top of the conversation rather than the subject of the conversation.



Always Expand Selected Conversations

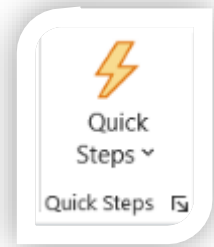
This option applies only to the selected conversation. The conversation selected when you select this check box will always appear expanded.

Use Classic Indented View

Classic Indented View displays messages in the indented conversation based on their position in the conversation.

↪ Quick Steps

- * Quick steps apply multiple actions to e-mail messages at the same time.
- * This allows you to quickly manage your mailbox.
- * For example, if you frequently move messages to a specific folder, you can use a quick step to move messages with a single click.
- * Or, if you're forwarding messages to your manager or colleagues, a quick one-click step can make it easier.
- * On the Home tab, click Quick Steps to use one of your actions, to manage your existing actions, or to create new ones.



Here's an example:

- * Click "Create New"
- * Give a name (Example, Billing)
- * Action: "REPLY"

- * **"Show Options"**
- * Complete "Subject – Importance – Text"
- * Click "Finish"
- * To edit or delete a **'Quick Step'**, click **'Manage Quick Steps'**

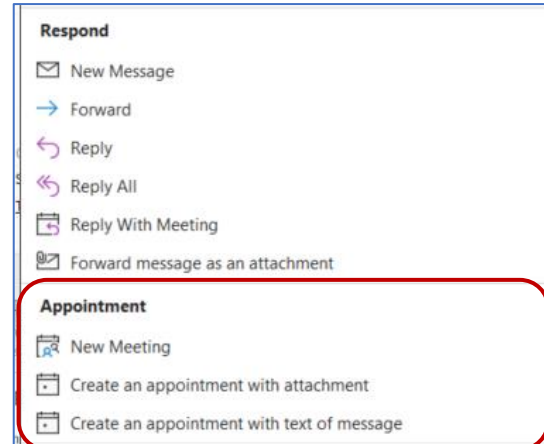
Now, check your "Quick Steps"

- * You received an invoice by email
- * Click in your message
- * Click on "**Quick Actions**" and choose "**Invoice**"

This little "Quick Steps" exercise looks a bit like an email template

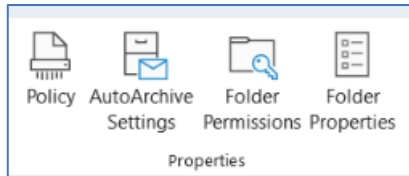


You can also schedule meetings

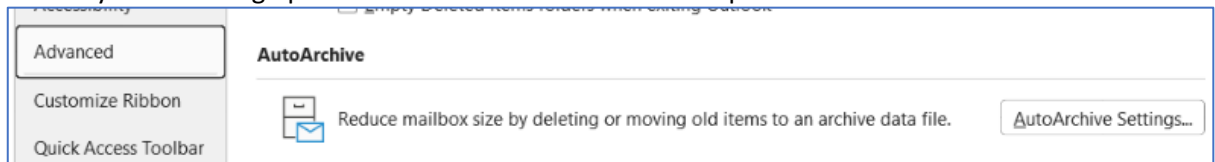


→ Manage the archiving of your emails

- * Outlook has already created a default archive folder for you, to have access to it, you go through the **AutoArchive Settings**. You go to the **File** tab, then **Options**, and click on **Advanced** and **AutoArchive Settings**.

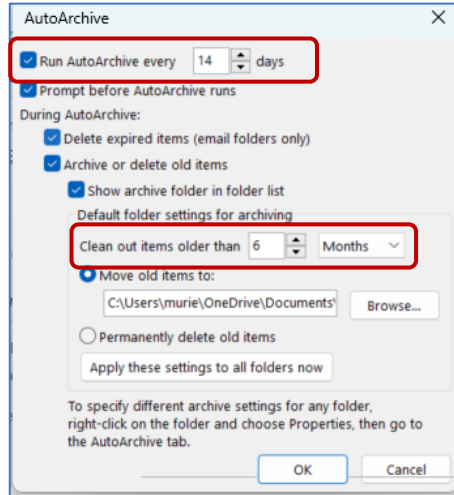


- * To access AutoArchive (option 1 above), click the File tab, then Options/ Advanced. Then, choose your archiving options and validate with Ok at each open box.

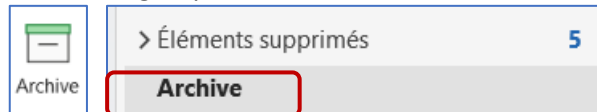


- * You determine the number of days
- * Do you want to permanently delete old messages?

- * If yes, after how many months for Clean out older than XX?
also Run AutoArchive every **XX days**



- * If you want to archive an email before the chosen time in automatic, or if you opt for manual archiving of your emails at any time, then a simple right-click on the email to then click on the Archive button (see image) or the same button from the Home tab and the Delete group



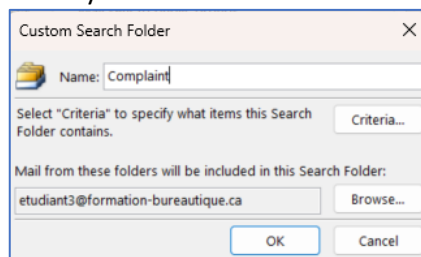
- * This email will be in the **Archive** folder in the **Folder Pane**

➔ Research Folders

A search folder is a virtual folder that displays all mail items that meet specific search criteria. For example, the Unread Mail search folder allows you to see all unread mail in a folder, even if they are in different folders within your mailbox.

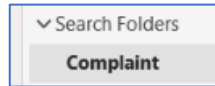
Search folders allow us to avoid always carrying out a search with the same criteria.

- * Right-click on Search Folder and click on **New Search Folder**
- * Select a search folder template or create a custom search folder
- * Name your research folder



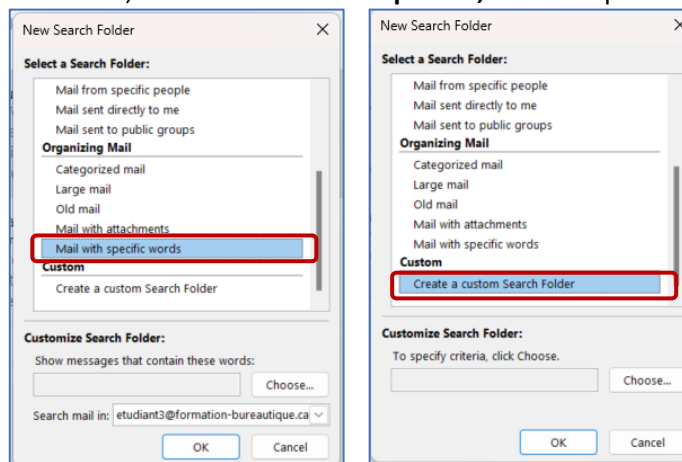
- * Click on **Choose** to fill in the search criteria

- * Confirm.
- * Your search folder now appears in your navigation pane under **Search Folders**.

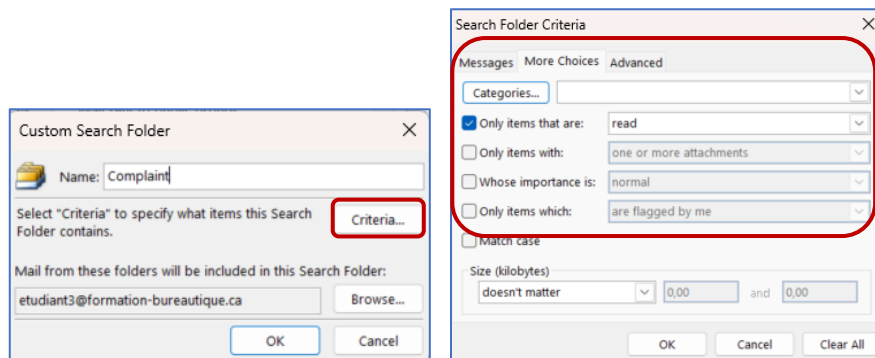


Exercise with a specific word

- * Right click
- * Choose Mail with Specific Words
- * In **Choose**, enter the word "**Complaint**", and then press **OK**



- * All emails with the word "**Complaint**" will go to this folder (including incoming and outgoing messages).
- * Deleting the email in the **search folder** will not delete the original message from the "**Inbox**" or "**Sent Items**".
- * If you choose "**Create a custom Search Folder**", you will have more options for your "**Folder**", click on "**Criteria...**"



Example: Word "**Complaint**" but if the message is "**Read**"

➔ Attach a file or Outlook item

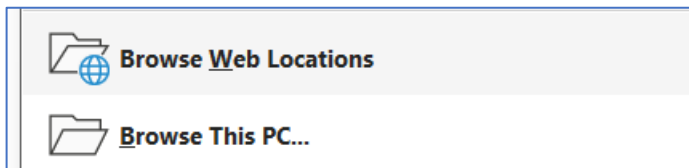
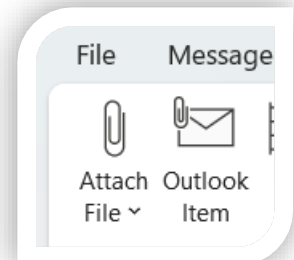
Attach a file

On the **Insert** tab, click the **Attach File** button when you create a message or meeting invitation and select your file.

If the file you're looking for isn't in the list of recent files, you can browse the files on your PC by clicking **Browse on PC** as well as the files stored on SharePoint and OneDrive by clicking

Browse web locations.

If your file is stored on OneDrive or SharePoint, you will be able to choose **Attach as a copy** of your document or **share a link** (for example, this will allow you to co-edit this document synchronously or asynchronously with the recipient)

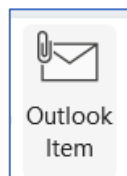


Attach Outlook items

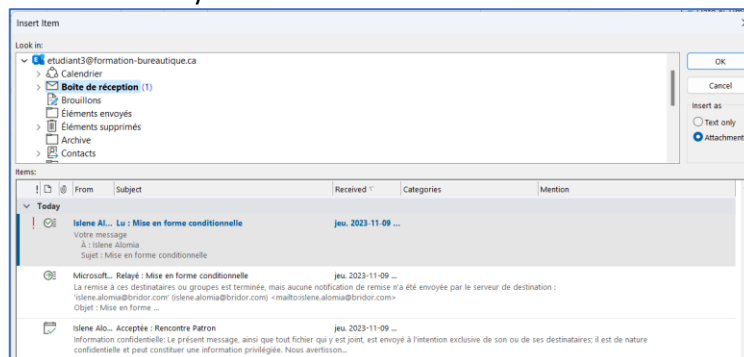
Why use this method?

If you forward a message to someone else as proof of receipt, be careful because you can modify a message at any time. So, this method would be the best because you will send the entire message, the attachments follow the email.

- * On the Insert tab, click **Outlook Item**



- * Select the item you want to share



- * Confirm by clicking OK

→ Delay delivery

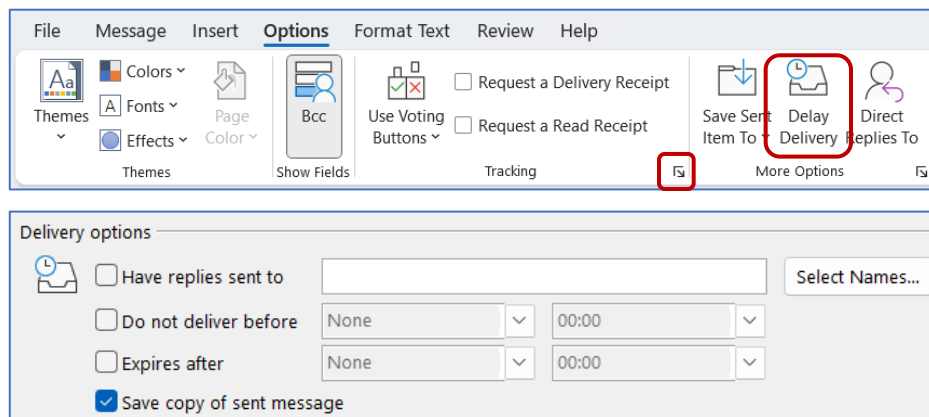
Sometimes the "**Do not deliver before**" option is more than necessary so that your work and especially your time management is at its maximum efficiency.

When you need to direct an email to a mass of people without blocking bandwidth, or you need to send messages before you take time off work and other reasons, Microsoft Outlook offers you the "**Delay Delivery**" option that allows you to prepare everything for sending and determine the date and time to send.



Warning: With a server taking over, your Outlook doesn't need to be opened, but without a server, remember to leave your Outlook open and your computer in sleep mode so that the send can be executed.

- * Click **New Email**, click the **Options** tab
- * Or click the dialog box launcher in the **Tracking** group or the "**Delay Delivery**" button in the **More Options** group



- * Check the "**Do not deliver before**" box and determine your options.

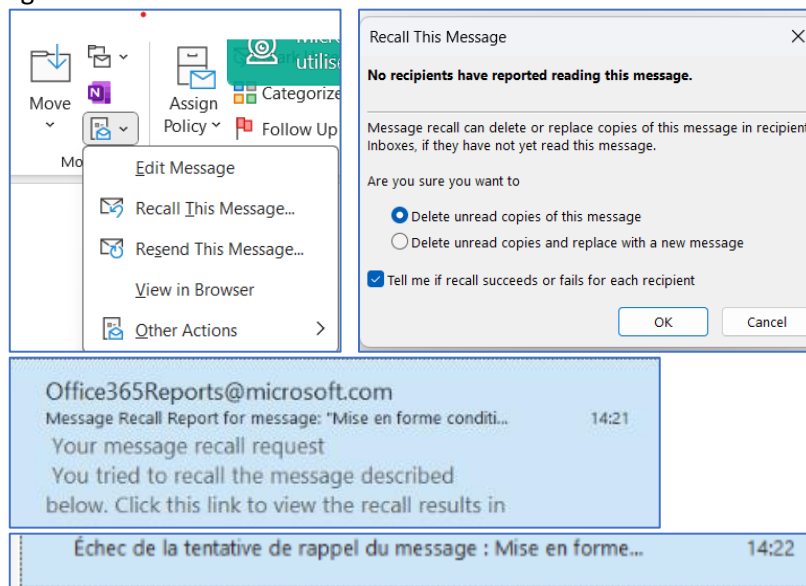
Note that you will always be able to disable this option from the message placed in the Outbox.

➔ Recall a message sent in error

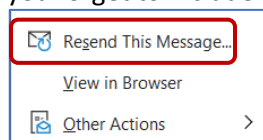
It could be that accidentally you may be directing an email to the wrong recipient or that you have sent a message with an error that needs to be corrected.

In this case, you will have to act quickly to recall your message, either to send it to the right recipient, or to correct it and resend it by following these steps:

- * In the Sent Items folder, open the email you want to recall
- * From the **Message** tab, in the **Move** group, pull down the **Actions** button and click **Recall this message**
- * In the dialog box that appears, choose the appropriate option. If it's the 2nd option, your message will open in send mode so you can make your corrections before sending it again



- * You are aware that our computers are always open, so it is almost impossible to recall a message.
- * However, "Edit Message" and/ or "Resend This Message" is still very interesting, in case you forget to include a file or add text.



→ Create a message using a template (form).

Create your own message templates if you often send similar emails.

- * From a new message form, type the subject of the message.
- * Type your text in the body of the message.
- * From the **File** tab, click **Save-As**.

| | |
|---------------|--------------------------|
| File name: | INVOICE.oft |
| Save as type: | Outlook Template (*.oft) |

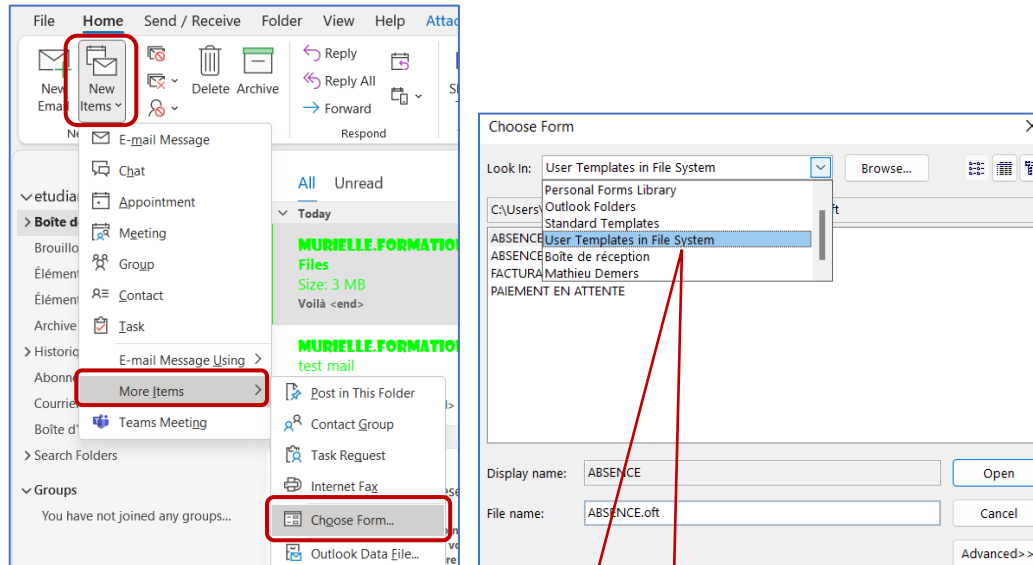
- * In Type, click **Outlook Template**.

| |
|--|
| Untitled.msg |
| Outlook Message Format - Unicode (*.msg) |
| Text Only (*.txt) |
| Outlook Template (*.oft) |
| Outlook Message Format (*.msg) |
| Outlook Message Format - Unicode (*.msg) |
| HTML (*.htm;*.html) |
| MHT files (*.mht) |

- * Click **Save**.

Create a message using a template:

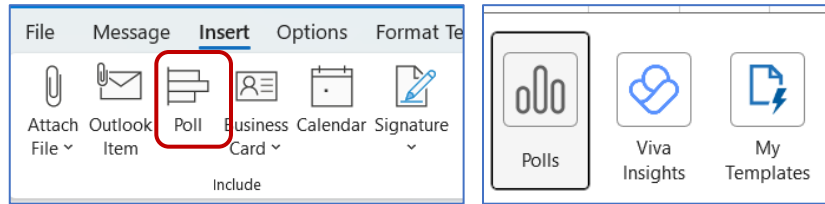
- * Click Home, click **New Items**



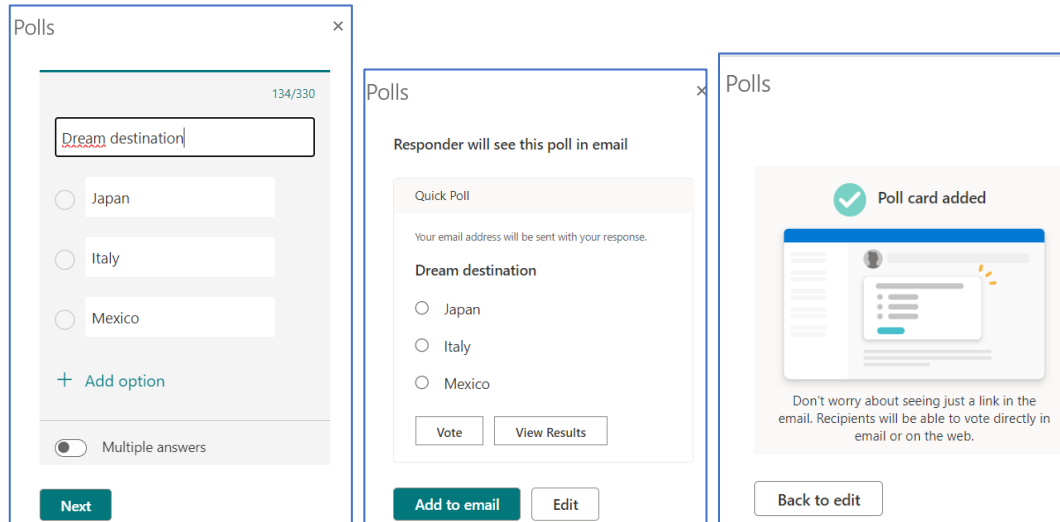
- * In Other Items, click **Choose Form**
- * In the Form window, click **User Templates in File System**

→ Create a Pool in an Email

- * In a new e-mail message, on the **Insert** tab, **Poll** or in **Message** tab, click **All Apps** and then **"Poll"**



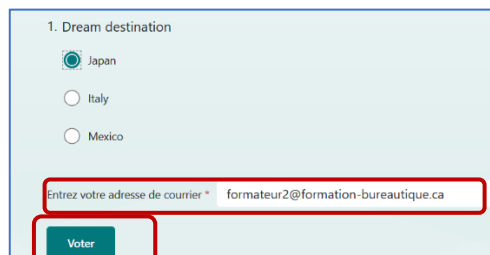
- * Enter your question then answer choices
- * Check at the bottom of the survey if multiple responses are allowed
- * Click **Add to Email** and you're done!



- * Enter the people concerned
- * Make sure you have this window in the email send

Dream destination ([View/vote in browser](#))

- * When the recipient receives their message
- * He or she will select an answer and click **"VOTE"**



- * The person will also be asked to enter their email address

Visualize the results

- * Return to your sent item
- * Click on "**View/Vote in browser**"

[Afficher les résultats](#)

You might be invited to insert your Email address

- * Click on "**Create My Own Form**" at the bottom of the page

Récents Mes formulaires

Dream destination

3 réponses

Very interesting...

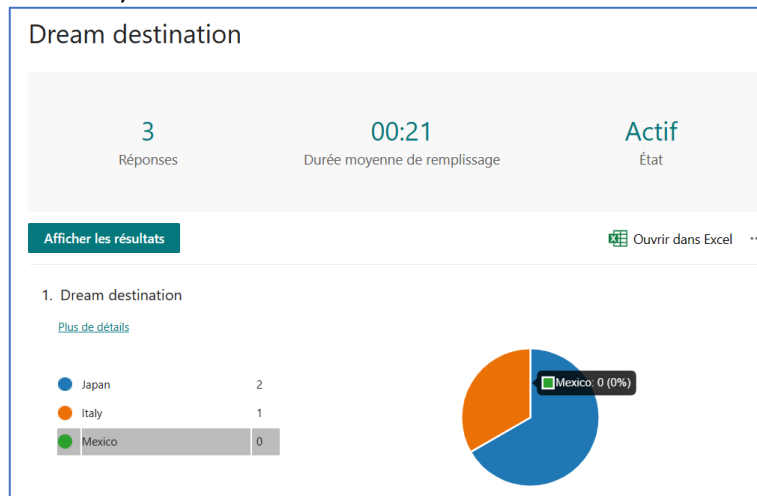


- * Click in your newly created form
- * Click on "**Answers**" to view the result

Forms

Questions **Réponses 3**

- * Visualize your result.



- * The report can even be sent to Excel

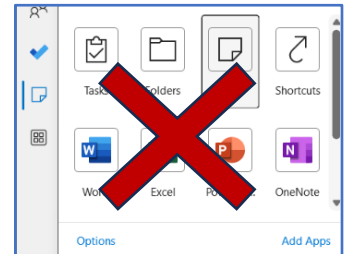
➔ Send to OneNote

OneNote is more interesting than the Notes you insert in Outlook.

Also, this is important information that you want to keep on your computer

What can we send to OneNote? ALL

- * Email
- * Scheduled or unscheduled appointment
- * Contact

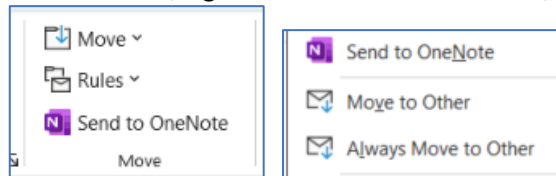


Why send to OneNote?

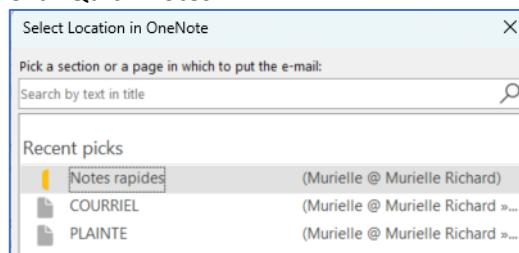
- * More Styles
- * More formatting: color, font size, etc.
- * Share notes with co-workers.

Here's an example.

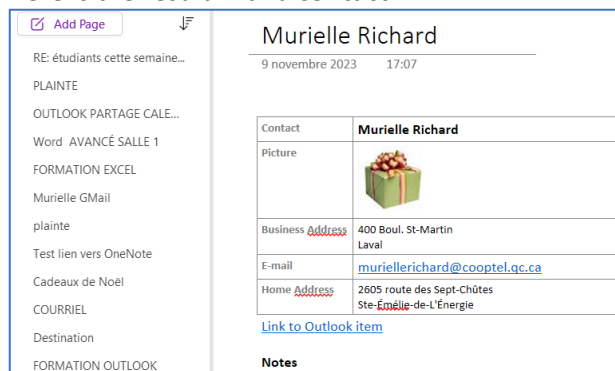
- * Take an email, right mouse click or **Home** tab, "Move" group, click "Send to OneNote"



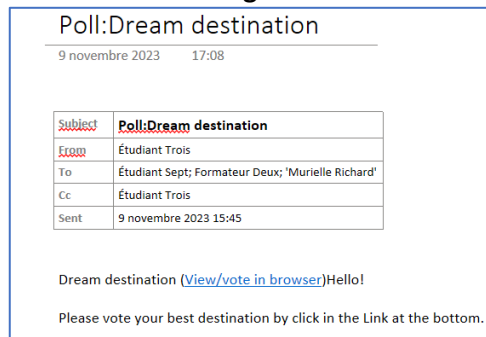
- * Click Quick Notes



- * Here is the result with a **contact**



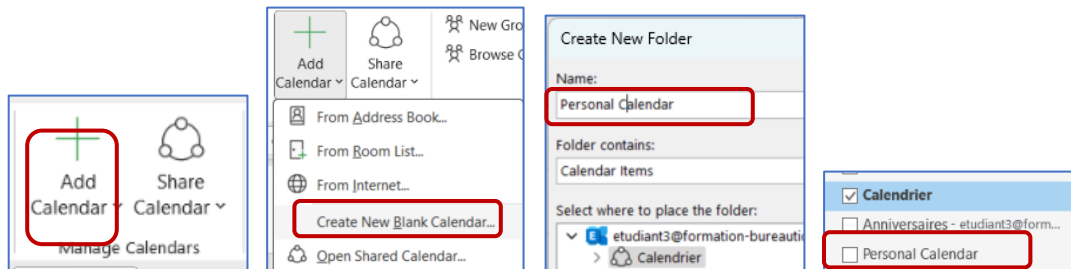
* Result with a **message**



→ The Calendar

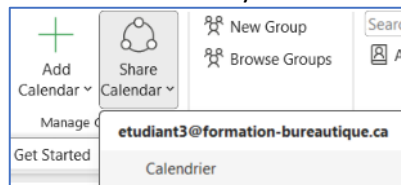
Create calendars and calendar groups

- * In addition to the default Microsoft Outlook calendar, you can create other calendars. For example, you can create a calendar for your personal appointments or for another company.
- * From the ribbon, click Add Calendar, and then click Create New Blank Calendar.
- * Name your calendar and then click on **Ok**.
- * If you right-click on your **My Calendars** group in the navigation pane, you'll have the option to create calendar groups in case you have a lot of calendars to manage.

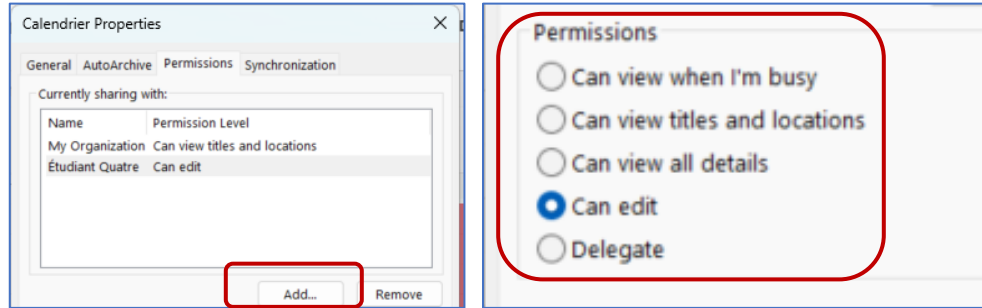


→ Share Calendar

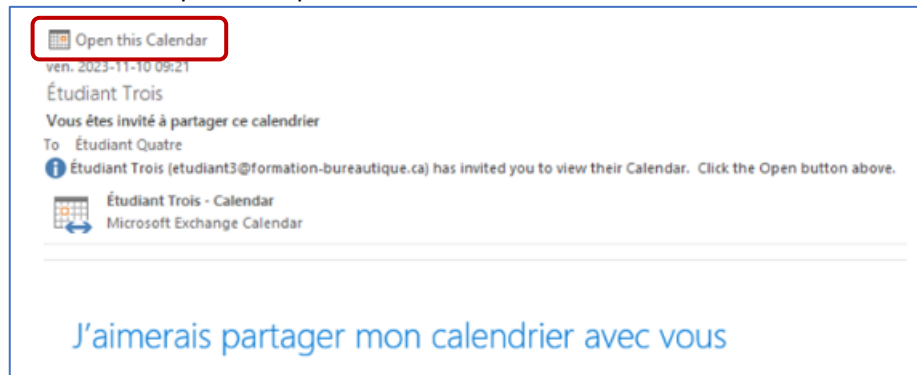
- * From Calendar, click on the Home tab, Manage Calendars group and then Share Calendar
- * Select the calendar you want to share



- * Click **Add** to access the address book and contacts and choose the people you want to share your calendar with.



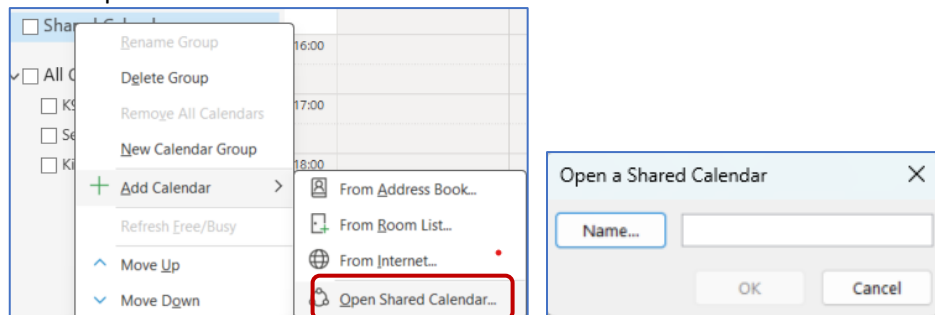
- * Choose the level of permission you grant it (Can view when I'm busy, can view titles and locations, can view all details)
- * In our case, Student 4 will receive an email, mentioning the sharing of the calendar, he will have the option to open the calendar.



➔ Open a shared calendar

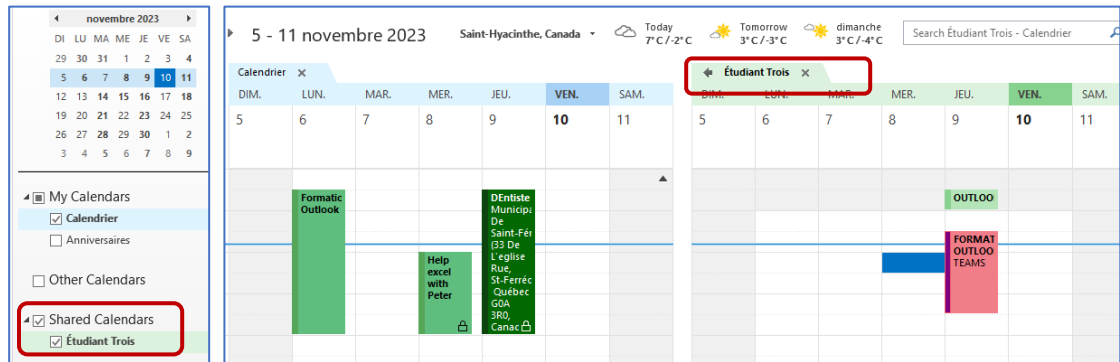
If the shared calendar isn't listed, here's how to do it...

- * From the Calendar tab, click **Add Calendar**
- * Select **Open Shared Calendar**



- * Enter the name of the person who shared the calendar with you or click **Name** to view the contacts and address book.
- * Validate with **ok**

- * Your colleague's calendar now appears in the **Shared calendars group** in the navigation pane

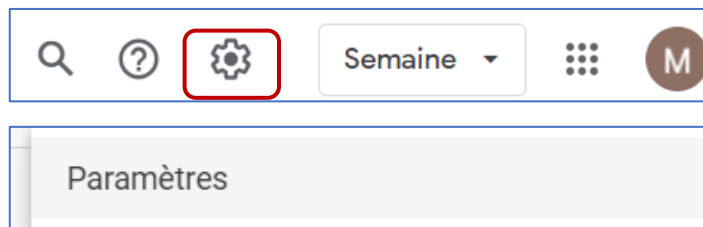


- * Do a test with your colleague
- * Allow a small delay before the new appointment appears.

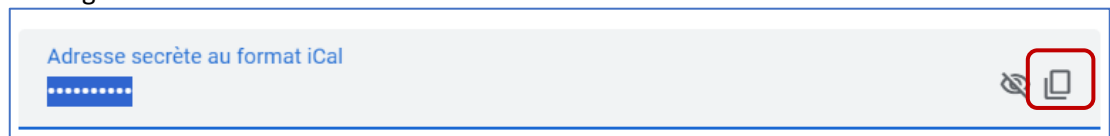
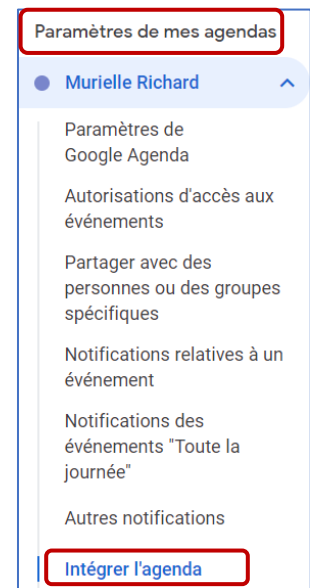
➔ Import sample calendars from a Google calendar

When importing an internet calendar such as Google's to your Outlook calendar item, choose the "**ical**" version so that it can update automatically.

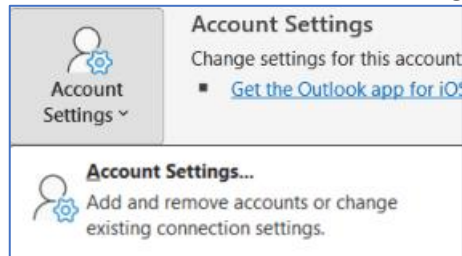
- * Log in to your **GMAIL** account or open your Calendar
- * Click in **Settings**



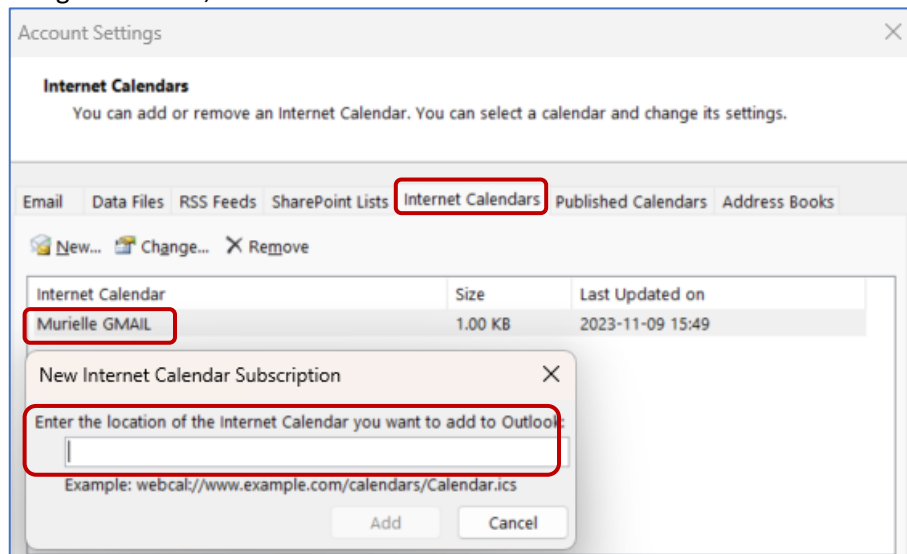
- * In the left column, click your **Calendars** to expand it
- * Then in My Calendar Settings, click Embed Calendar
- * In **Customize**, look for the *Secret Address in iCal format*,
- * Then click the Copy to **Clipboard** button. Confirm the warning message with Ok.



- * In Outlook, select **File/Account Settings** and then select **Account Settings**.



- * On the Internet Calendars tab, click **New** and paste the link from the previously copied Google Calendar, and then confirm the insertion.



- * Rename your calendar in Outlook as needed.
- * When you start Outlook, there is an update to your Google Calendar and download changes. Regular updates to open Outlook also allow changes to be downloaded.

*Even if Outlook is open, the update is not always immediate.
So be patient.*

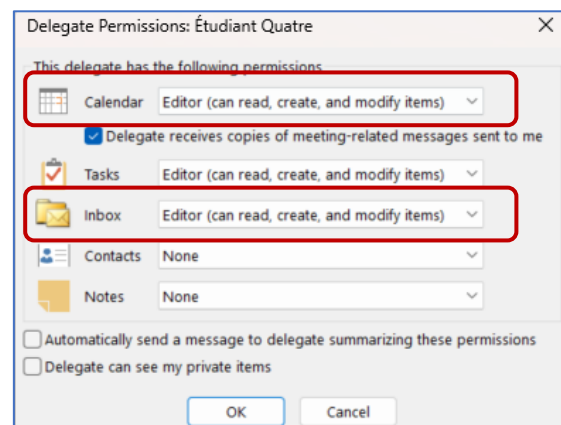
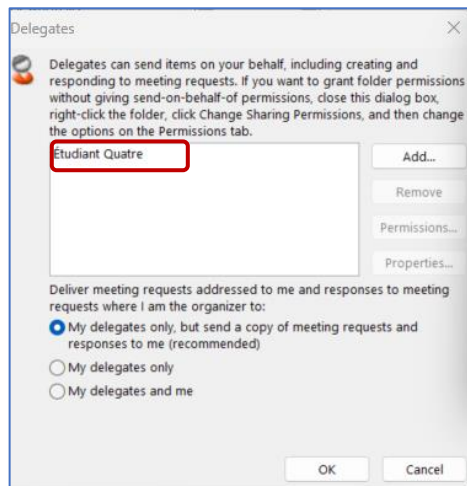
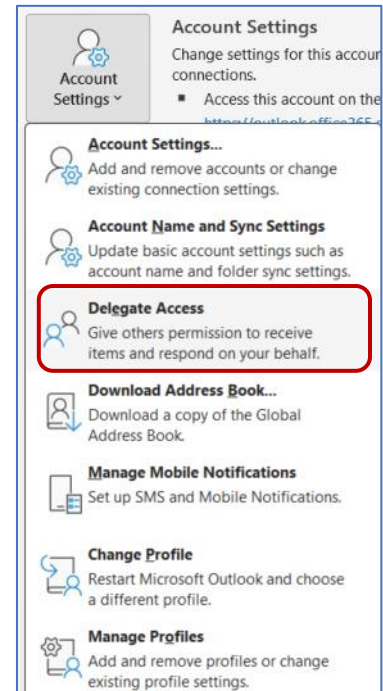


→ Delegation

Designate someone as your delegate

Just as an assistant can help you manage the paper mail you receive, another person, called a delegate, can receive, and respond to email messages and meeting requests on your behalf. You can also grant your delegate additional permissions that allow them to read, create, or modify items in your Microsoft Exchange Server mailbox.

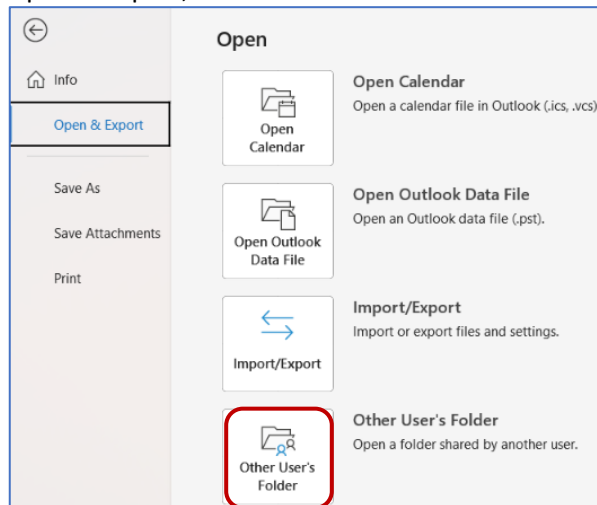
- * Click the **File** tab
- * Click Account Settings, and then click Delegate Access
- * Click **Add**
- * Type the name of the person you want to designate as a delegate or search for it. Click **Add** and then click **Ok**.
- * In the **Permissions Granted to Delegates** dialog box, accept the default permissions settings, or select custom access levels for **Exchange** folders.
- * To send a message notifying the delegate of changes to their permissions, select the **Automatically send a message to delegate check box to summarize those permissions**.
- * Optionally, you can select the **Delegate can see my private items** checkbox.
- * Click **OK**.
- * Now you've delegated emails and calendar to **Student4**



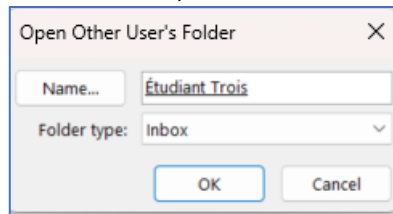
- * There is still one step to be taken by the delegate, c.ad. Student4

Delegate's final action to manage emails

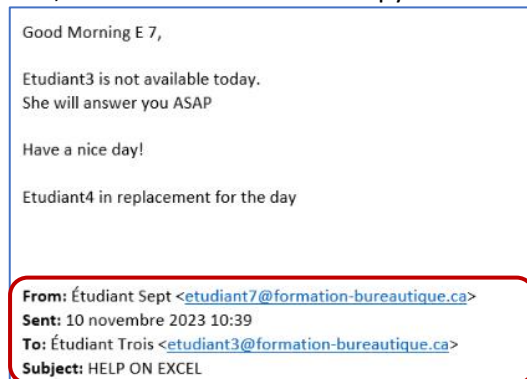
- * From the **File** menu
- * Open & Export, click in Other User's Folder



- * Click on **Name**, then choose the person who authorizes you to manage their emails

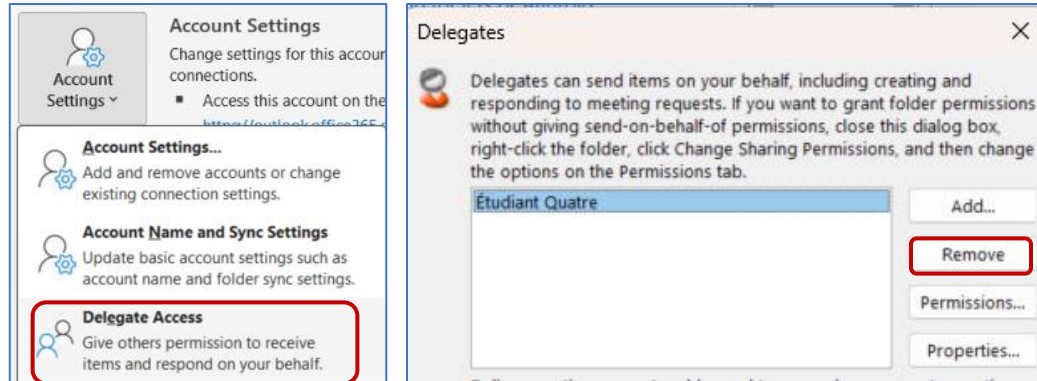


- * Click **OK**
- * Verify by sending an email, Student 4 will receive the Email and will be able to answer also, student 3 will receive a copy.



To remove permissions

- * Click the **File** tab
- * Click Account Settings, and then click Delegate Access
- * Click Delete

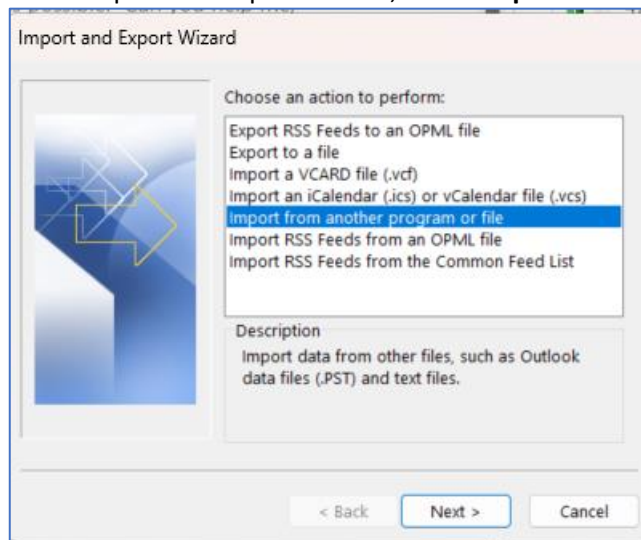


➔ Import your contacts from EXCEL

In the Outlook basics course, we learned how to export contacts, or incoming and outgoing messages, as well as the calendar.

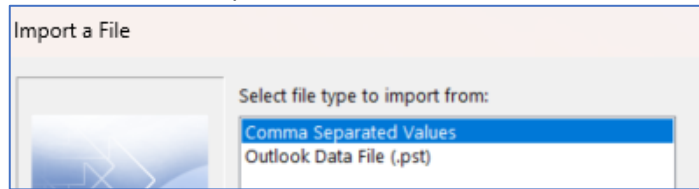
Exercise with importing contacts that are located in Excel

- * Open Outlook, click File, "**Open & Export**",
- * Click on "Import/Export".
- * In the Import and Export Wizard, select **Import from another program or file**

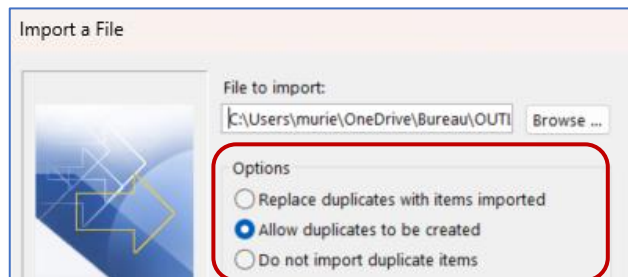
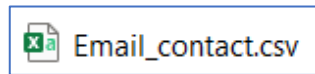


- * Click **Next**

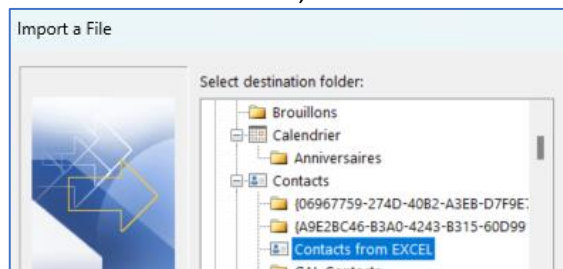
- * Choose Comma-Separated Values, click Next



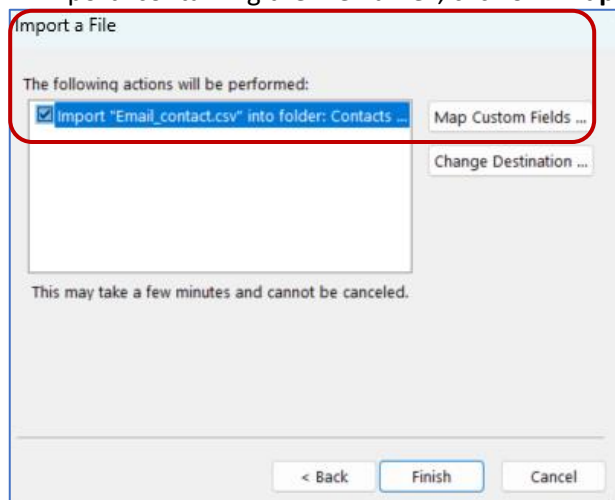
- * Go to the location where you saved the file and open it "Test with me by opening:



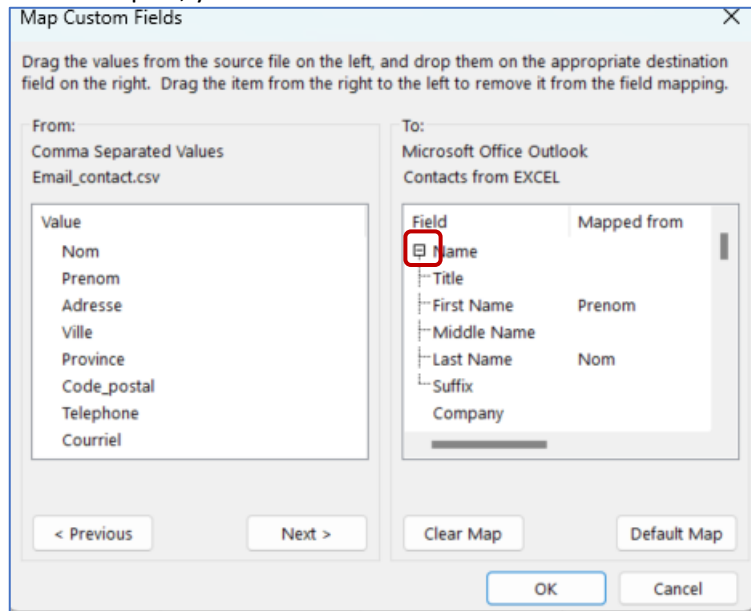
- * You will have to choose one of the three options, click on **Next**
- * Click the **Contacts** folder, click **Next**



- * In Import "containing the file name", click on "**Map Custom Fields...**" »

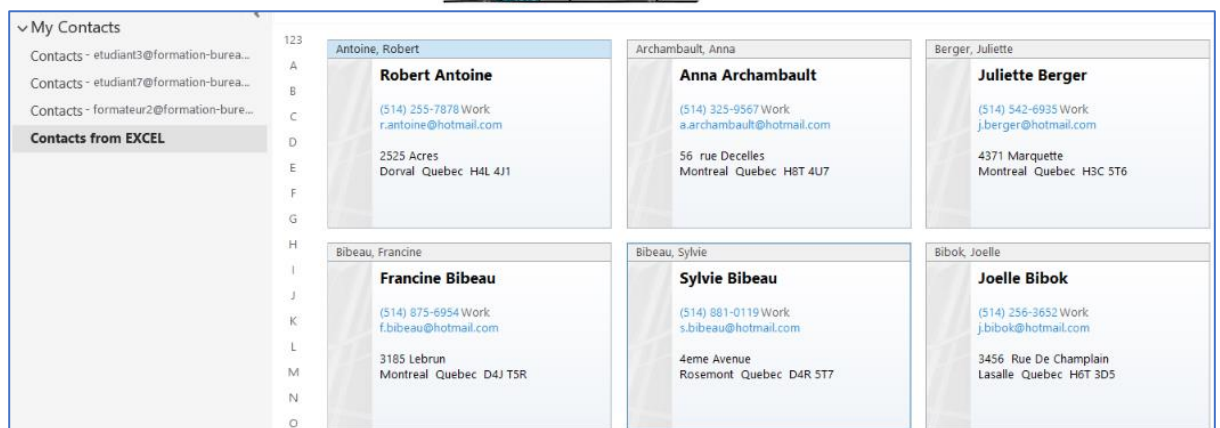


- * In the last part, you need to match the fields



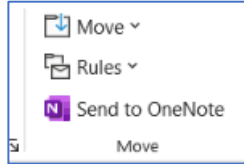
- * Open the small + on the right
- * Drag Nom (room left) to right to **"Last Name"**
- * Example for **"Prenom"**, located on the left, send it to the right to match **"First name"**
- * Another example: If in Excel you wrote **"Company"** instead of **"Corporation"**, you drag the **"Company to Corporation"** field, to combine these two fields.
- * When all the fields are grouped together, click **OK**
- * Click **Finish**

Here is the result



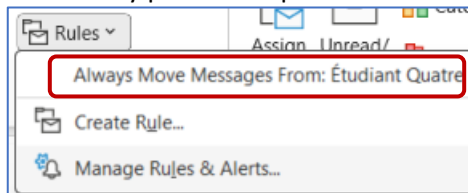
→ Create a rule

You create a rule to move messages to a folder, but also to delete **certain unwanted messages**, to block messages with specific words in order to delete them permanently.

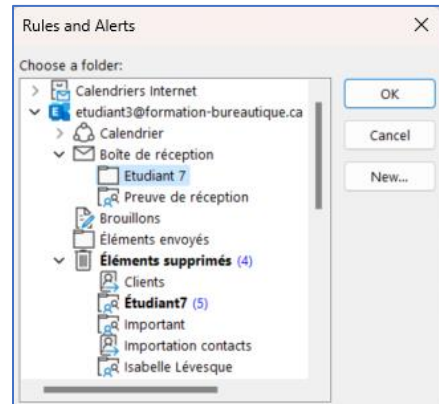
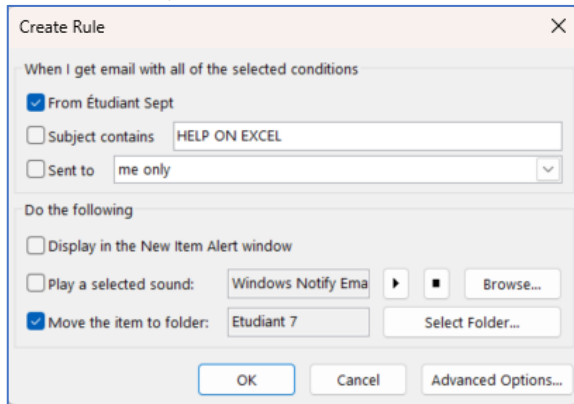


Create a simple rule to move in a folder

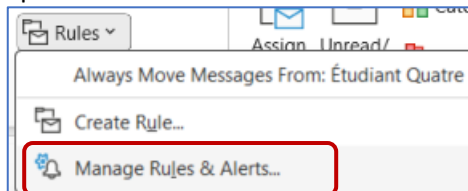
- * This first solution is quick, just click on one of the contact's messages, with the right click button, then on **Rules**. In the **Move** group of the **Home** tab and choose the option "**Always move messages from:** ".and choose the destination **folder**. Here, you can't include any particular specifications.



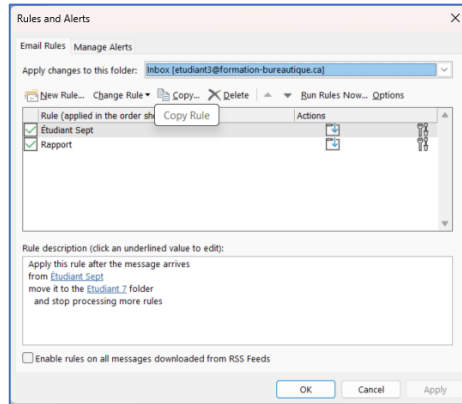
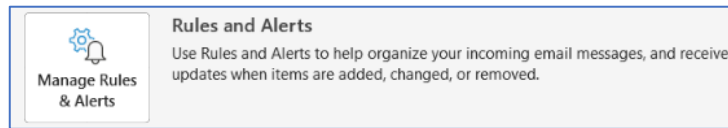
- * The second solution gives you a few additional options. Similarly, click on one of the contact's messages, click **Rules** in the **Move** group on the **Home** tab, and choose the **Create Rule...**,



- * Edit or delete the rules
Click **Rules** in the **Move** group on the **Home** tab, choose the **Manage Rules & Alerts** option

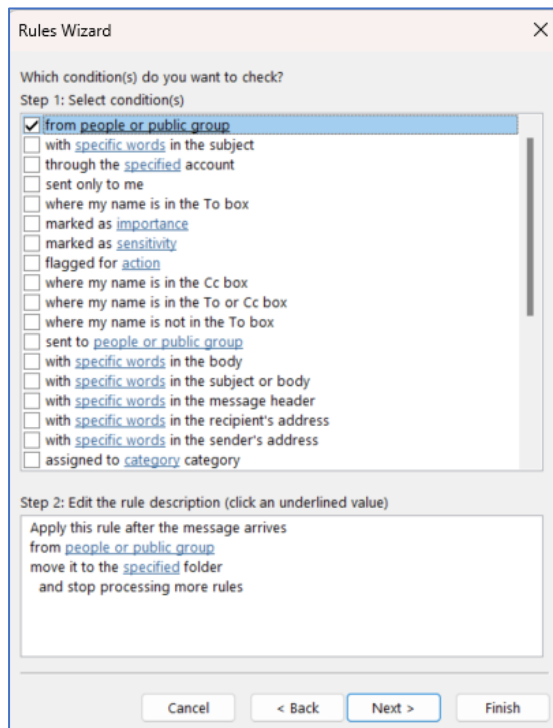


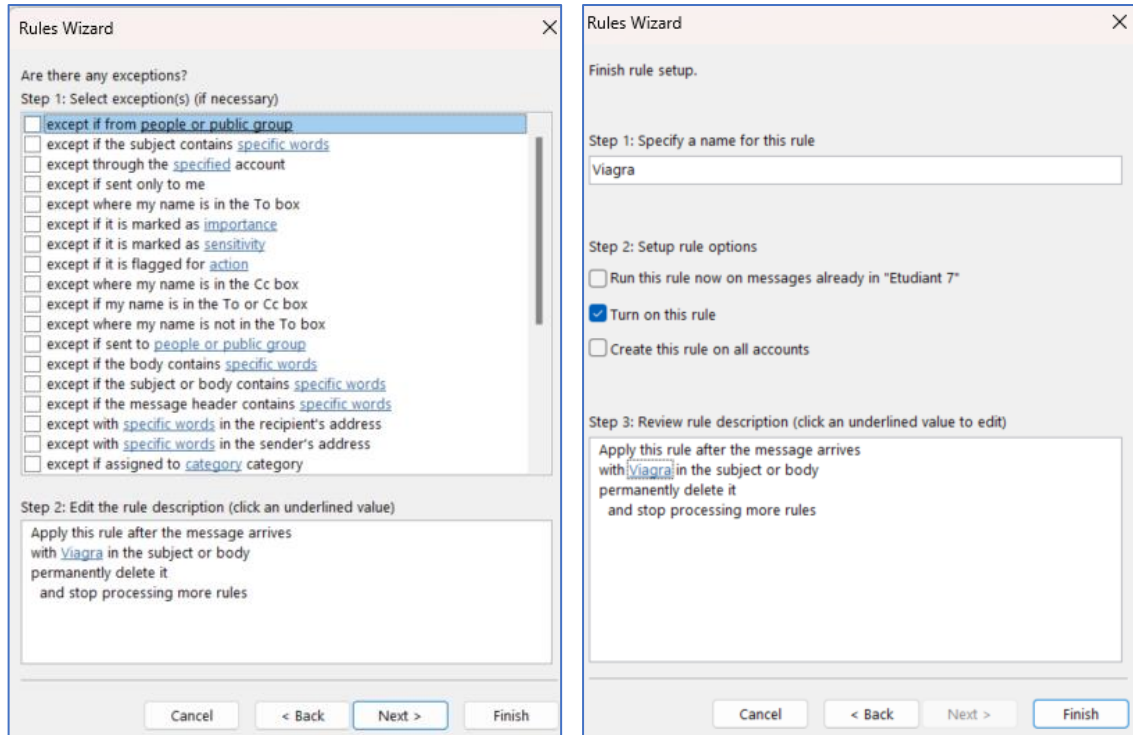
- * Manage rules and alerts will also be found in **File**



Create a more complex rule

You can also fully customize your rule step by step. It's longer, but above all more precise. Click **Rules** in the **Move** group on the **Home** tab, choose the **Manage Rules & Alerts...** Complete the 6 dialog boxes that appear during the validations (next button). Of course, you don't have to complete everything if it doesn't meet your expectations. You can skip a step with the NEXT button. In your last step after naming your rule, you can enable it on messages that have already been received or not.





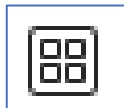
*It is possible that 2 rules conflict.
In this case, it is always the highest rule in the list that takes
precedence over the following ones.
Consider changing the order of your rules with the arrows.*

➔ Journal Management

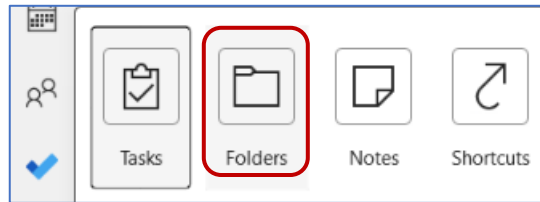
The Journal is used to store either a conversation, a phone call, it can also be a letter received or sent, well, it is something you want to remember.

Create a "Journal" entry

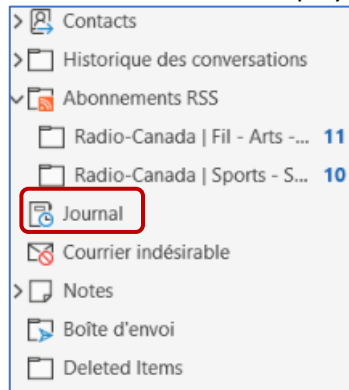
- * Click on "More Apps"



- * To activate the Journal, click on "**Folders**"



- * The "**Journal**" will be displayed in the "Folder Pane"



- * Click on "Journal Entry" located in Home OR CTRL+N
- * Type the subject, entry type, date, time, etc.

- * Save & Close

Edit a "Journal" entry

- * Move to the item in the timeline layout on its creation date
- * Right-click on the item and choose the "Open Journal Entry" command
- * Make changes

Delete a "Journal" entry

- * Move to the item in the timeline layout on its creation date
- * Right-click on the item and choose the "Delete" command

➔ RSS FEED



Definition

Subscribing to a site's RSS feed is like asking them to send us new content as it is published.

That way, we don't have to develop the reflex to visit our favorite sites every day.

You are automatically informed of all the updates of the sites to which you are subscribed to the RSS feed!

In short, it's a way to have, in one place, all the news that interests us.

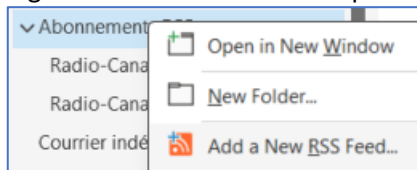
(Example of a source: <https://francoischarron.com/sur-le-web/trucs-conseils/quest-ce-que-les-flux-rss-et-comment-les-utiliser/K5yqzuX1TO/>)

Subscribe to an RSS Feed in Outlook

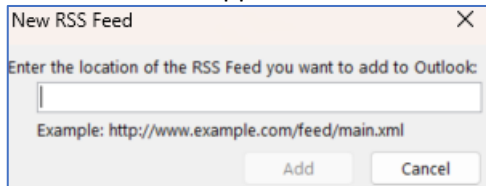
- * Make sure you have access to your feeds by making sure it's checked and if not, by checking the "any RSS feed item..." »
- * Open the list of Outlook folders (Click on the Other Applications buttons at the top left, then Folders)



- * Right-click on the RSS Subscription folder, then click on Add RSS Feed

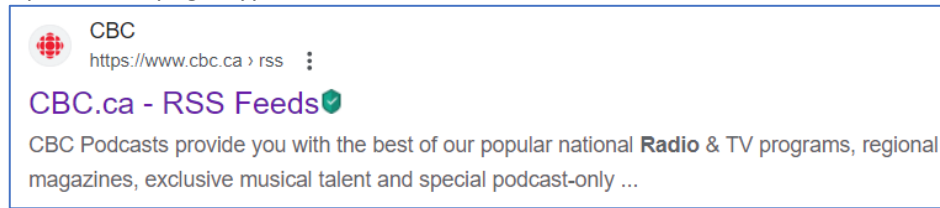


- * This window will appear

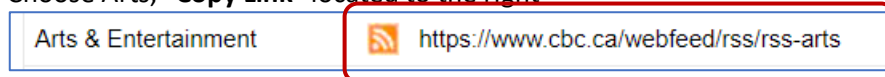


- * Find your site and the feed to subscribe to, e.g.: **Radio Canada**

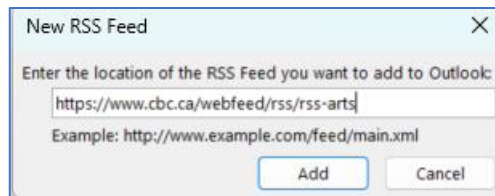
- * Open a web page, type **Radio Canada RSS**



- * Click on this link
- * We will have a few choices: "**Sports news**" or "**General news**" or "**Regional news**"
- * Choose Arts, "**Copy Link**" located to the right



- * Paste the URL of the RSS feed into the Outlook dialog box that opens.



- * If a warning message appears to protect you. It's up to you to validate your subscription. You can rename it as needed
- * Click OK

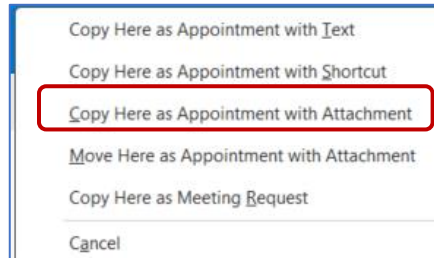
→ A TIME-SAVING PRACTICE ON OUTLOOK

Drag and Drop

- * For a more efficient organization on Outlook, here are the best practices to adopt:
- * Use the "Drag and drop" button to turn any Outlook item into another (email into an appointment, a task or a contact, an appointment into a task...)
- * You need to drag one item (example a task) to another (example a Calendar) in your navigation pane on the left side of your screen.
- * However, dragging and dropping with the left side of the mouse has a few drawbacks to consider:
 - ▲ Duplicating the element
 - ▲ Attachments disappear...
- * To overcome these problems, use the "Drag and Drop" with the **right side** of the mouse.
- * In this case, you get a choice of options that will allow you to determine exactly which option you are interested in.

Example 1 with an email

- * Grab an email and we want to schedule an appointment
- * On the email, right mouse button and drag to **the calendar**
- * Choose With Attachment
- * Here is the result



- * If you take the option: **Copy here as meeting request**
Here's the result:

Example 2 with multiple contacts received by email to be forwarded

- * If you have received several contacts to put in your list and we don't want to do this one by one, here's how to do it:
- * Select All Attachments (**CTRL+A**)
- * With the mouse, (not with the right mouse button), drag the contacts to your **"Contacts Button"**



- * Go see, they're all here...

