Mastering Microsoft Outlook®

OBJECTIVE:

The goal of this class is to learn:

A) Microsoft Outlook® to:

1) Maintain all emails
2) Maintain a fully functional calendar with all appointments
3) Maintain a working contact database.

Microsoft Outlook®

I. Emailing.
    A. Keeping emails in systematic folders.
    B. Creating signatures.
    C. Interacting with Calendar & Virtual Cards.
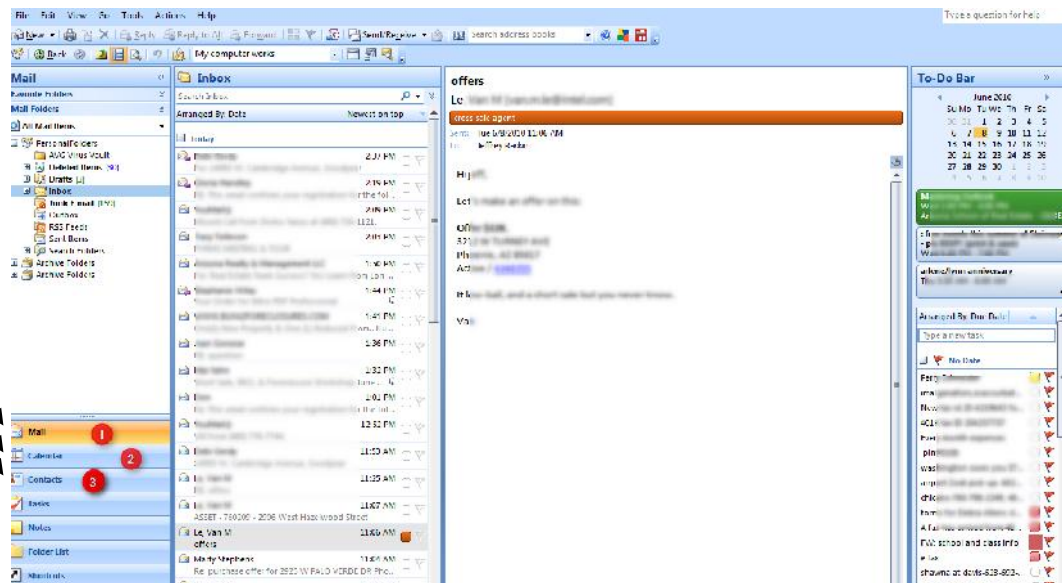II. Using Calendar.
    A. To set appointments & transaction coordinating.
    B. For time management & reoccurring appointments.
III. Using Virtual Cards (v-cards.)
    A. To maintain a list and categorize all client and associates.
    B. To keep detailed notes of conversations.
    C. Sending to other people via email.

■ Manage email
■ Manage schedule
■ Manage database

I. Emails   (difference between online & hard drive based)

Maintain Emails (with POP3 & SMTP)

- Create folders to mirror the folders on your desktop (including templates)
- Drag and drop the emails into the individual folders
- Drag the folders into your desktop folders

> Right click on the Inbox, click *New Folder* and create systematic filing system. Drag and drop all emails for that client into that particular folder.

Creating Email Accounts

- Go to *Tools, Options, Mail Setup, E-mail Accounts….* Click on *E-mail*, *New* & follow set up wizard.

> -The POP3 is what tells your email where the email is coming from, while the SMTP is what tells your email what server your email is going out from.
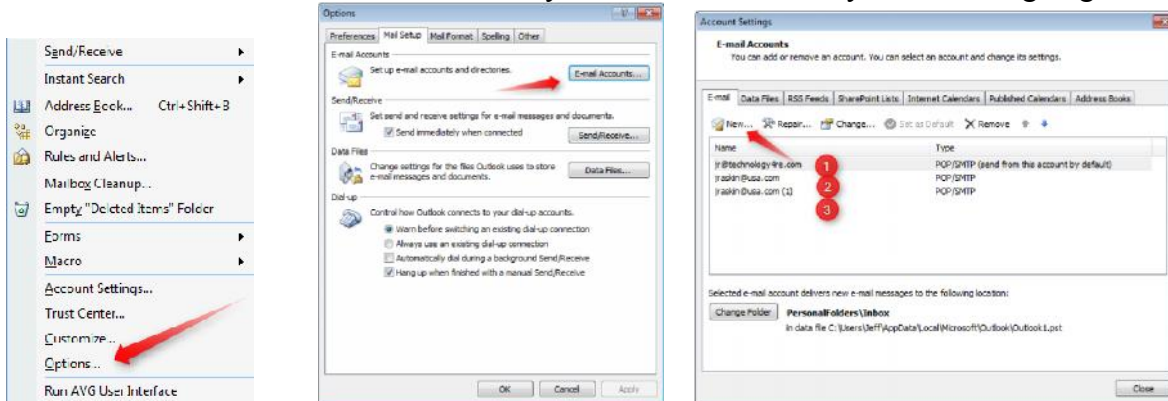
> *Note: Outside of the COX network , you will have to change the ougoing code*

Creating Signatures In Emails

- This will allow you to put your contact information on all emails going out
Go to *Tools*, *Options*, *Mail Format*, *Signatures*. Click *New*, enter a name for your signature, click *Next*, type information & click *OK*.
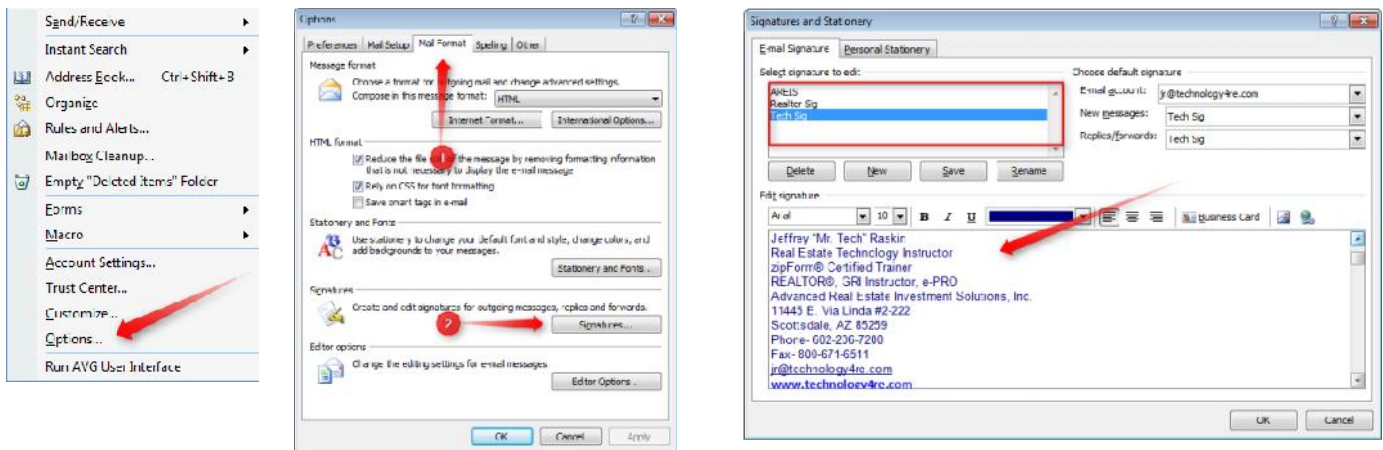
Creating Rules

- Right click on an email, go to Create Rule and choose which folder you want the email to go to, based on subject or name.
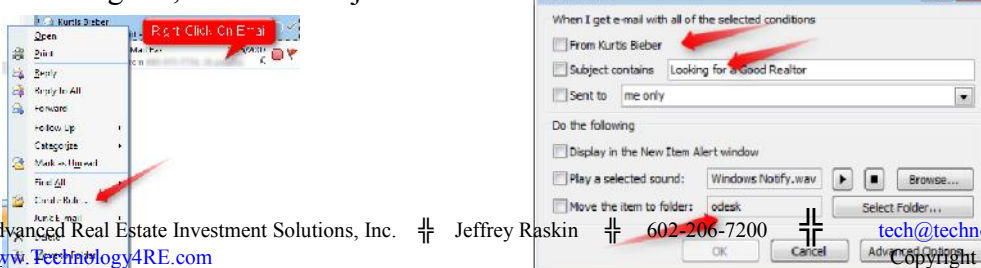

> *Tip: To select certain emails, push **Ctrl** while left clicking on the mouse. To select multiple emails at once, click the **Shift** key while left clicking.*

II. Calendar

Get rid of the appointment book by putting all appointments in the calendar & sync with your phone.

Create appointments by 1) right clicking on the space in the calendar or 2) dragging and dropping an email directly into the calendar.
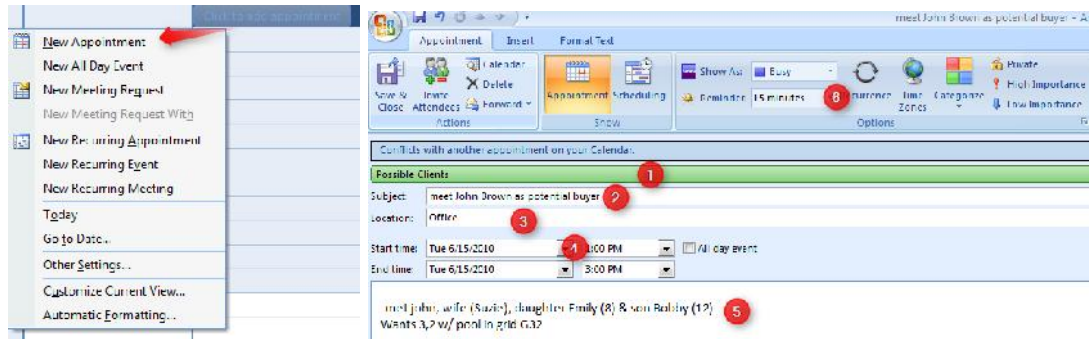
1. Categorize this by color coding (category feature in 2003)
2. Put in Subject of the meeting. (this will fill automatically if you drag & drop the email into calendar)
3. Put in the Location of where the meeting will take place.
4. Put in the date and time.
5. Type specific information about the meeting.
6. Put in Reminder time

Notice how Outlook will remind you if there is a conflict with another appointment.

You can email the client with *Invite Attendees*, where they can accept the initiation and it will automatically go into their Outlook calendar. They can also reject or email back with a different appointment time.
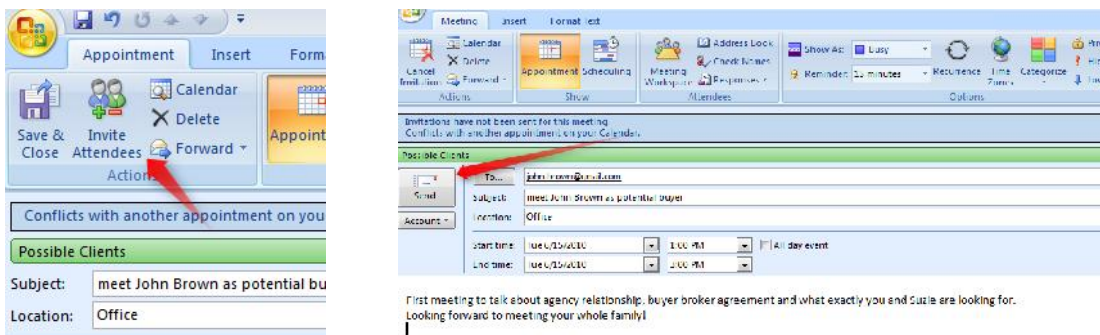
Copy the appointment to each day an event occurs, holding the Control key as you're left clicking and dragging to the day of the event. Rename the event in the subject

Clicking on *Recurrence* will allow you to schedule this on a weekly, monthly, yearly or other predetermined time basis.
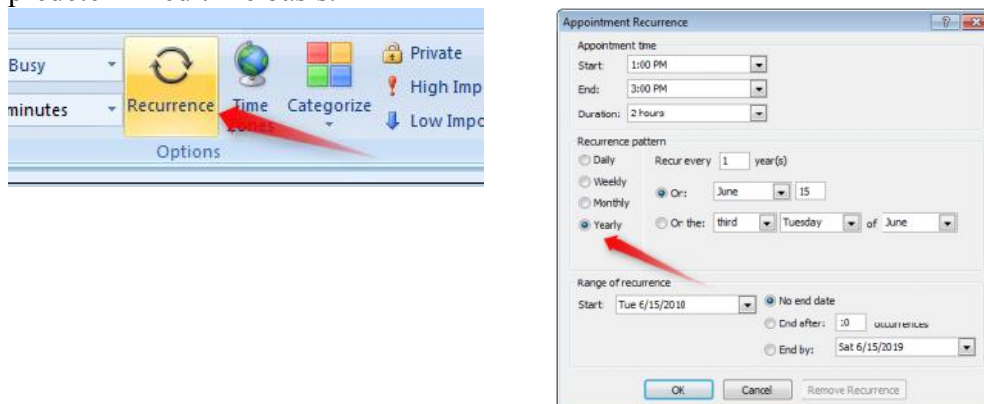
III. Database- Creating Virtual Cards (V-cards)

You will be creating a new card for each person you meet.
Create v-cards by 1) going to *Contacts* and click *New* at top or
2) dragging and dropping an email directly into the calendar.

1. Categorize this by color coding

2. Put information in the respective fields. This will be put in there automatically if it were dragged & dropped from an email.
3. Insert a picture.
4. Put information in the respective fields.
5. Keep on running ledger on what you've done with the clients.
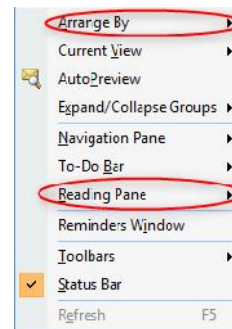

You know have a full list of everybody categorized. You can place people in multiple categories.

Other functions

-Learn short cuts, that will allow you to save time by using the keyboard features in lieu of the mouse.
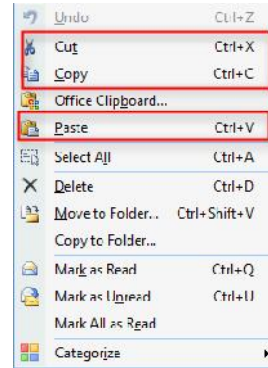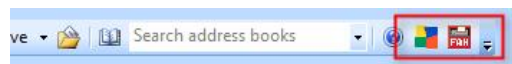

-You can change the way you view your emails & task bar by clicking on *View.* There are many different options.

-You can sync to your smart phones to duplicate all the information in your computer to your phone.

-There are add-ins, such as 3rd party real estate specific software products that will add other buttons to Outlook.

*General Trick: Just about everything in Outlook can be dragged and dropped, including email attachments. Don't use the paperclip **Attach File**- just drag & drop!*