

Outlook for Contact Management Workshop



Microsoft Outlook is a sophisticated communication and personal organisation tool. While most people use the Calendar and Tasks folders alongside their email, Outlook has many features and capabilities that remain unexploited. This is one of a series of workshops to show the depths that Outlook has.

Objectives

This workshop will show users the how to use Contacts for more than just a list of names and addresses and operate an elementary CRM system.

Designed For

Existing users of Outlook who have many different people and conversations to keep track of.

Duration

3 hours

Topics

Contact Information and Useful Fields

- Contact Numbers
- Addresses
- Categories
- Contacts
- Picture

Contact Actions

- Email, Appointment, Meeting, Tasks
- Viewing Activities
- Recording notes

Using Rules with Contacts

- Colouring Emails
- Moving Emails

Tasks

- Creating a task from an email message
- Useful task fields (Categories, Contacts, Work)

Email

- Sending an Email Shot

Follow-Up

Outlook Calendar and Tasks Workshop
Outlook Email Best Practice and Avoiding Overload Workshop
Using Outlook to Manage your Time
Individual tuition as required.

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