

How to Save Time and Make More Money with Microsoft Outlook!

Learn Seven Ways to Maximize Outlook








With Amy Chorew
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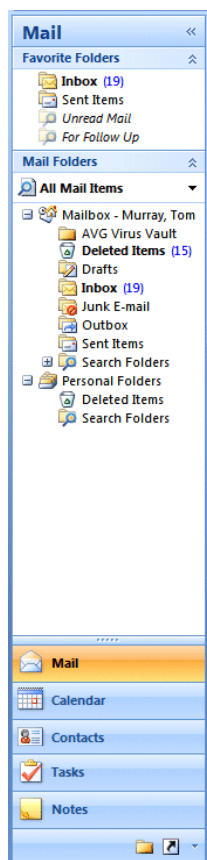
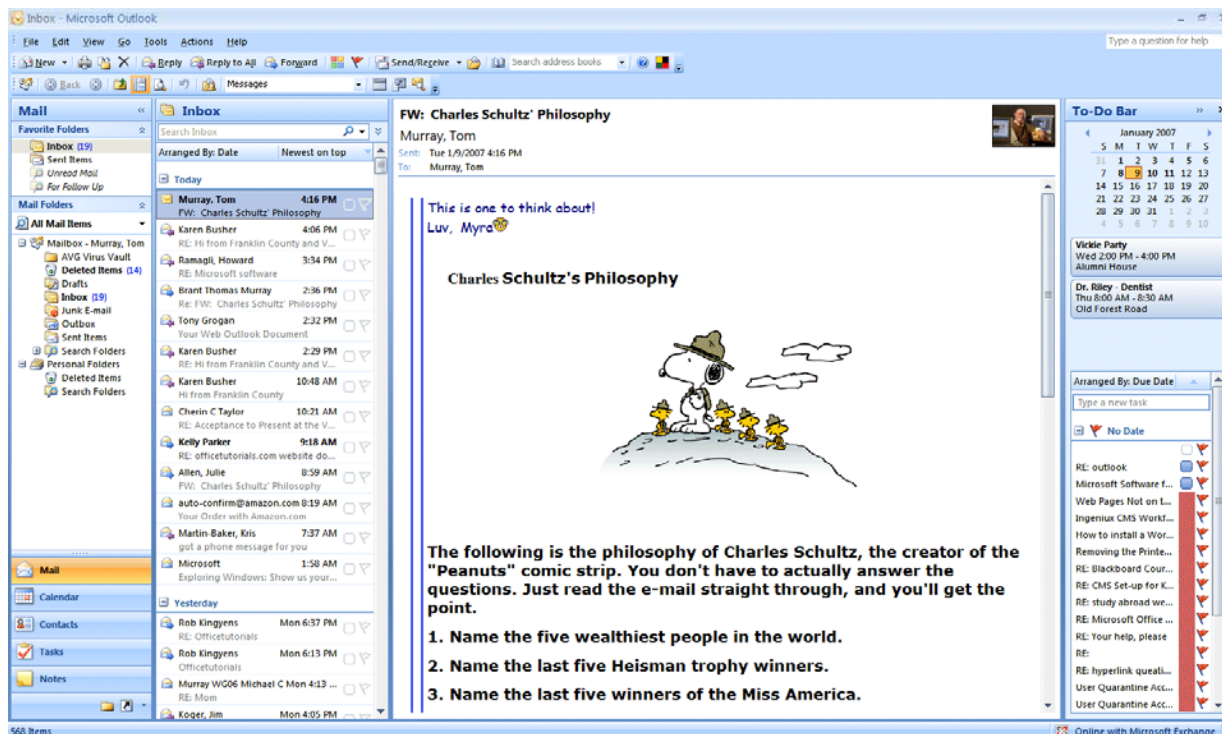
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What we will cover . . .

1. Enhancing your email
 - a) Email Etiquette
 - b) Why Outlook?
-  2. Organizing your Email
 - a) Folder
 - b) Rules
-  3. Outlook as Contact Manager
 - a) How to add Contacts from Email
 - b) How to send contact information to a client or contact without the having to retype it
 - c) How to add recurring events like client birthdays, anniversary's etc., to a contact record
-  4. Using the Calendar
 - a) How to easily set appointments and meetings and get confirmations
 - b) How to send an appointment confirmation so your recipient can easily save it to their calendar
-  5. Creating an Enewsletter
 - a) How to create and send group e-mails without using blind cc
 - b) How to create an e-mail template so you can avoid typing the same e-mail over and over
 - c) What content to put in ENewsletter
 - d) Using Email Merge
-  6. Power of Signatures
 - a) Creating Multiple Signatures
7. Syncing with your Email Enabled Phone
 - a) Wireless Sync advantages
 - a) Microsoft Exchange versus Google Apps
8. There's an App for that!
 - a) Add-ons that make sense

Outlook as a CRM - Contact Relation Manager



Navigation Pane

When you first open Outlook 2007 your screen will normally look like the image above.

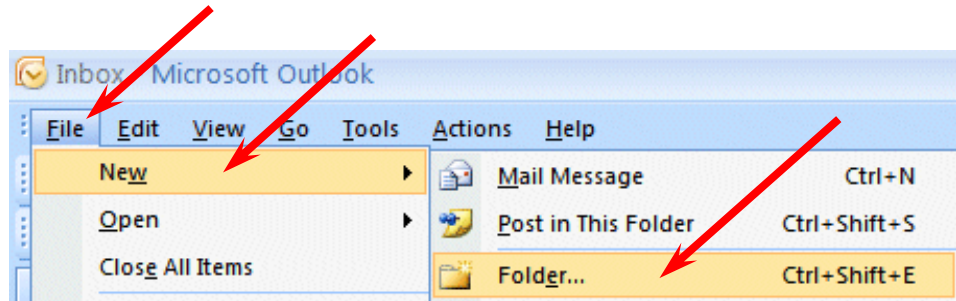
On the left side of the screen you'll see an image similar to the one on the right. This is called the Navigation Pane. You'll notice in the top area that it indicates Mail. Below Mail there is an area called Mail Folders.

Below the Mail area you'll see a series of Buttons: Mail, Calendar, Contacts, Tasks and Notes. Notice that the Mail button is orange. This means that this button has been selected (when you opened Outlook Mail).

Get Organized with Folders

Email Folders help today's Sales Professionals to be more organized and productive.

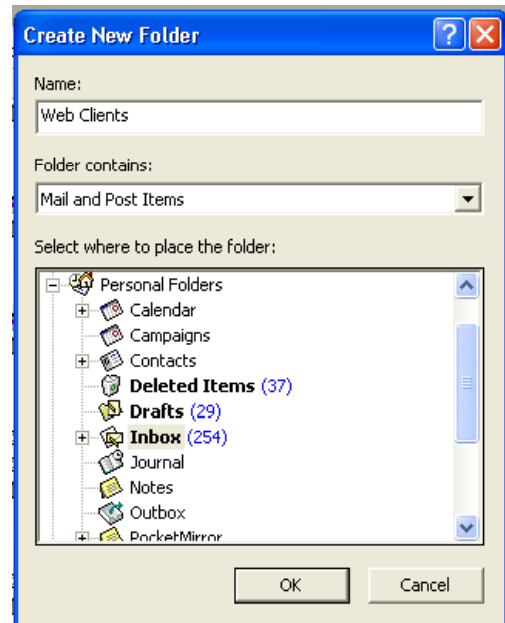
You can create personal (non-system) folders to organize your messages any way you like. You can create an unlimited number of folders and subfolders so Outlook can mimic your personal organization approach.



You can create custom folders of any type, including email, calendar and tasks folders.

To move messages into a folder, simply **Drag and Drop** them from one folder to another.

For example, drag new messages from the INBOX into your CLIENTS folder (using the mouse).



Techbyte (Amy's Shortcut)

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Sonoma Enterprises

Pat Zaby – Respond

Eurekaware

Xobni

GTD – Get things done add on

Calendar Sharing:

www.airset.com

Google Docs and Calendar

Microsoft Office Groove

outlook4team.com

Other CRM products to consider:

Avidian

RealFutureCRM

Pipeline

WiseAgent