

# Outlook 2007 New Features Update for CPAs

This course emphasizes features which will enhance productivity for tracking and managing client contact information, locating documents, sharing team calendars and archiving client information. Interactivity with Excel and Word will also be covered.

## OBJECTIVES

Upon completion of this course, participants will be able to:

- Learn interaction between Outlook, Word and Excel
- Understand features for group/team calendars and calendar overlay
- Examine how to set folder permissions, rules, add categories for contacts and tasks
- Understand subfolder setup, shortcuts/hyperlinks
- Learn how to import and export contact information
- Examine advanced searching and search folders to find client information quickly
- Evaluate program option settings to suit the way you work
- Understand intelligent grouping and advanced topics for client contact management
- Take away tutorial references for after class use

## HIGHLIGHTS

- How to use the Outlook user interface reading pane, navigation pane and task pane
- Creating subfolders, set email options, prioritize email, set rules to process email
- Setting up additional accounts to receive email from multiple internet accounts
- How to set Out of Office replies and rules
- Creating archive folders and understand the variety of archive settings
- Using color features to automatically prioritize in email, contacts, or tasks
- Setup the new search folders to locate information quickly
- Using contact forms for creating, sharing and tracking interaction with contacts
- Generate a map of driving directions to a client address
- Task views and categories
- Electronically delegate tasks
- Time-saving tips for entering appointments
- Share calendars and group overlay schedules
- Set permissions to delegate maintenance of Outlook folders by administrators
- Desktop alerts for incoming information
- Add hyperlinks to connect to files or web pages
- Send email and attach documents directly from Word
- Send spreadsheets or ranges of a spreadsheet directly from Excel
- Save a calendar as an HTML page
- Time-saving keyboard shortcuts for reading email
- Arrange email by conversation or use the Contact Form to review client conversations
- View multiple Outlook folders at the same time
- Using the Notes form with the Contact form to document telephone conversations
- Time-saving contextual ribbon tools and customizing the Quick Access Toolbar

## DESIGNED FOR

CPAs and industry professionals needing to enhance and update skills to take advantage of the new productivity features in Outlook 2007 that apply to client contact management

For information regarding on-site training, email [aicpalearning@aicpa.org](mailto:aicpalearning@aicpa.org), call **800.634.6780 (Option 1)**, or visit [aicpalearning.org](http://aicpalearning.org).



## RECOMMENDED CPE:

8

## PREREQUISITE:

Basic knowledge of MS Outlook

## EVENT ID:

OUTLK07L

## COURSE LEVEL:

Update

## FIELD OF STUDY:

Computer Science

## BLI CURRICULUM:

Technical Expertise

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## VENDOR:

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