

# Microsoft Outlook Training Agenda (Level 100)

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## Focus

Introduction to Outlook and Exchange Online Basics, Terms, and Features centered around the Outlook Desktop Application.

## Exchange Online vs. Email Client

- Exchange Online
  - Business-class email
  - Minimum 50gb standard email storage
  - Allows syncing of Emails, Calendars, Contacts and Tasks between PCs, Mobile devices, and the Web
- Email Client
  - For example: Outlook Desktop App – *Allows you to access multiple email accounts in one Profile including POP, IMAP and Exchange accounts*
- How to Access Outlook
  - Browser: [www.portal.office.com](http://www.portal.office.com)
  - Outlook Desktop app
  - Outlook Mobile app (*supported on iOS, Android*)
- Outlook Desktop App
  - Ribbon - *Provides more options depending on items selected*
    - Message
    - Meeting
    - Contact
  - Send/Receive
    - Default sync time for emails
  - View
    - Customize layout
    - Folder pane
    - Reading pane
    - To-Do pane
  - Interface
    - Mail and Message
      - Favorites
      - Inbox and Folders
      - Signatures
      - Attaching files
    - Names
      - Address Book
      - Check Names

- Best Practices
  - Reply vs. Reply All
  - CC vs. BCC
  - Signatures
  - Flags and Reminders
- Calendar
  - Appointments
    - No invites
  - Meetings
    - In-person meeting
    - Teams meeting
  - Best Practices
    - Reply with a Meeting
    - Locations explained
- New Office 365 Features
  - @Mentions
  - Bing Maps location info
  - MyAnalytics
- Advanced Topics to Mention
  - File> Options
  - Import/Export
  - Move and Rules
- Use-Case: How to use Mail Merge to send customer-facing emails
  - Pre-requisites: *Basic Excel, Word and Outlook*
  - Excel
  - Create table
    - List header names in Row 1 (e.g. First Name, Last Name, Email Address)
    - Fill the table with the appropriate information in the columns
    - Save the document
- Word
  - Draft email (within Word)
  - Navigate to Mailings in Ribbon
  - Start the Mail Merge for email messages
    - Mail Merge can also be started within Outlook using your contact list
  - Select recipients and point to the Excel file with the contact information
  - Write and Insert Fields where appropriate in the email draft
  - Preview Results
  - Finish and Merge
- Outlook
  - Verifying Outbox for pending emails
  - Verifying Send folder for sent emails