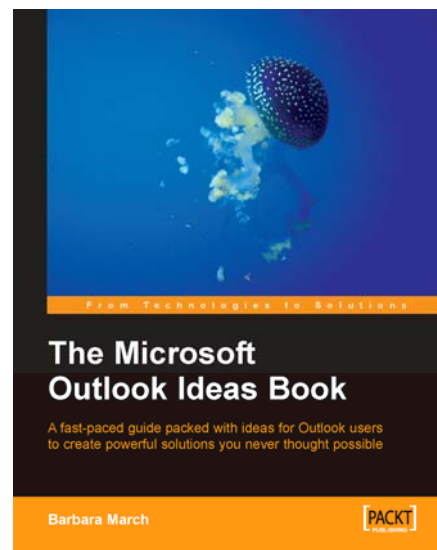




The Microsoft Outlook Ideas Book

Barbara March



Chapter 4 "Whole Solutions"

In this package, you will find:

A Biography of the author of the book

A preview chapter from the book, Chapter 4 "Whole Solutions"

A synopsis of the book's content

Information on where to buy this book

About the Author

Barbara March's long career in office administration, in many different industries, and her passion for computer software led her into software training. After obtaining Microsoft Office Specialist qualifications at Expert level and becoming a Microsoft MOUS Master Instructor, Barbara extended her knowledge and expertise further in MS Office by achieving outstanding pass marks in ECDL Advanced examinations. This knowledge and expertise, she has applied in all her posts including her current role as a data analyst in a local authority.

Barbara's analytical mind forces her to question the accepted boundaries of the software she uses and to apply her flair and imagination to find ways to use the software capabilities to the limit and to the benefit of her performance and professionalism.

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4

Whole Solutions

So far we have explored unconventional uses of Outlook's individual components and we have utilized the business example of "Our Company" to demonstrate:

- Staff records: Recording and evaluating staff leave
- A vehicle pool: Recording and monitoring vehicle details, servicing, etc. and linking to users
- Suppliers: Organizing their records into an invaluable business directory
- Taxi booking records that could be applied to other services

In this way, we have been developing an Outlook solution for Our Company, but this solution is not quite complete, there is more that we can do for Our Company.

In this chapter, we will complete the solution for Our Company, integrating various Outlook and Office components, and will also explore another 'whole solution', a School-based example that we haven't yet introduced.

Our Company Solution

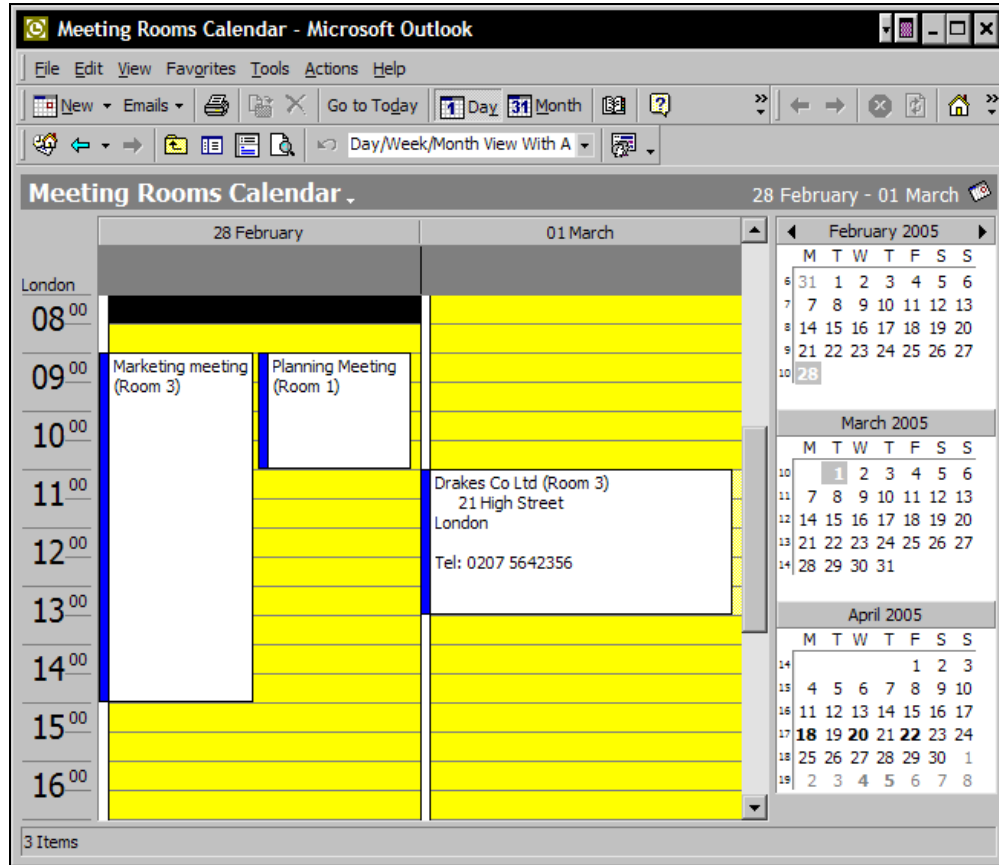
We will create a scenario involving both the Outlook and Office components.

Meeting Room Management

Meeting room bookings are commonly managed using a separate calendar, and these reservations may be for external organizations as well as for internal groups. The calendar in which these bookings are recorded will resemble an appointments calendar except that the items will refer to the rooms in which the meetings are being held rather than the meetings themselves. When more than one meeting is taking place in different

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rooms and at the same time, concurrent entries are inevitable and acceptable. A simplified and small portion of such a Meeting Rooms Calendar might look something like the following:



This view provides a clear image of what is happening in the meeting rooms over a short period of time. However, a schedule of meeting room activity over a greater period of time and with more detail about who booked the room, the revenue due from external bookings, etc. would be very useful for analysis and planning purposes.

Outlook can produce such a view of a Meeting Rooms Calendar that will

- Display a schedule of all current and future room booking details
- Distinguish between internal and external reservations
- Automatically calculate the cost to the external hirer

Before we begin to design this view of the Meeting Rooms Calendar, there should be in place **Contacts** records for hirers of the rooms, whether they are colleagues in the same company or customers in external organizations. We also need **Contacts** records for each of the meeting rooms and a **Contacts** folder named **Meeting Rooms** in which to store them. Although Outlook **Contacts** folders are normally associated with storing the details of people, there is no reason why **Contacts** folders cannot hold the records of inanimate objects. By creating and manipulating **Contacts** records for items, Outlook truly becomes a supreme information manager.

Before building the set of meeting room contacts, we first need to create the new **Contacts** folder. This is done in the usual way by right-clicking in the Outlook folder list and choosing **New Folder** and naming the folder **Meeting Rooms**.

Creating **Contacts** records for hirers needs no special instruction and the only field that needs to be completed on the **Contact** form for the rooms is the **Full Name** field; the details of the rooms will be recorded in the view and not in the **Contact** record.

We now have individual **Contacts** for each of the meeting rooms and **Contacts** for the hirers, all of which we can link to the bookings in the Meeting Rooms Calendar. We can now create the view of the Meeting Rooms **Contacts** folder that will display the details of the rooms.

Creating a Meeting Rooms View

1. Create a new table-type view from the Define Views | New option and name the view Meeting Rooms.
2. In the View Summary dialog box, click Fields and select the field Full Name, and click OK.
3. We will create the following manual fields:

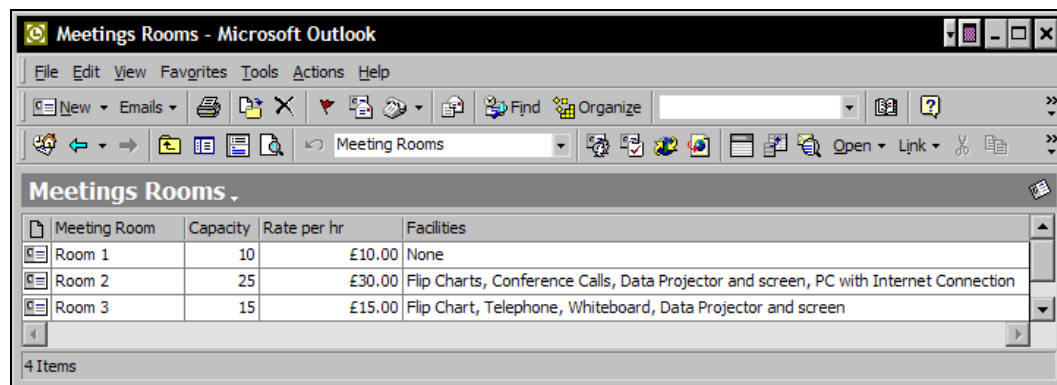
Name	Type	Format	Purpose
Capacity	Number	Raw	To enter the number of people the room can accommodate
Rate per hr	Currency	2 decimal places	To record the cost per hour to hire each room
Facilities	Text	Text	To enter the equipment etc. available in each room

4. Rename the Full Name field to Meeting Room, from the Format Columns dialog box.

All four fields require you to enter manually the details about the rooms i.e. the name or number of the room, how many people it can accommodate, the facilities that it has e.g. projector, flip charts, whiteboard, teleconference facilities, etc., and the hourly rate for external hire.

The Result

The following screenshot shows Meeting Rooms view:



Creating the Meeting Room Calendar View

The steps to create this view begin with linking the bookings to the **Contacts** forms of the internal or external hirers and to the **Contacts** forms of the rooms. This will provide a bookings history by room and by person or company.

This view can also be adapted to display reservations by room, by date, by occupant, or by internal or external booking just by changing the way that the items are grouped. Finally, we will see how the calendar appointment form can be redesigned to integrate with Microsoft Word to print an invoice for the room hire and how Outlook can produce a monthly statement for the hirer.

1. Create two new Categories for the room bookings named Internal and External.
2. Enter room bookings into the Calendar in the normal Day/Week/Month view and assign either the Internal or External category depending on whether it is an internal or external hirer.
3. Create a new table-type view from the Define Views | New option and name the view Meeting room calendar.
4. In the View Summary dialog box, click Fields, and select the fields: Location, Subject, Contacts, Start, End, and Duration, and click OK.
5. We will create three new manual fields that will be used to build one Address field and these fields will also be used later in the development of the form and the printing of the invoice:

Name	Type	Format	Purpose
Add Line 1	Text	Text	To enter the first address line of the hirer
Add Line 2	Text	Text	To enter the second address line of the hirer
Add Line 3	Text	Text	To enter the third address line of the hirer

Name	Type	In the Formula Field window
Start Time	Formula	Format([Start],"h:mm")
Room Chrg	Formula	If([Location]="Room 1",Format(10,"Currency"),If([Location]="Room 2",Format(30,"Currency"),If([Location]="Room 3",Format(15,"Currency"),"Rate?"))
Total Fee	Formula	If([Categories]="External",Format([Room Chrg]*[Duration]/60,"Currency"),If([Categories]= "Internal","Internal"))
Address	Combination	[Add Line 1] [Add Line 2] [Add Line 3]

6. To restrict the bookings in the view to current and future, add a filtering criterion. From the Filter | Advanced tab create the following filter:

Field	Condition	Value
Start	On or after	today

7. To distinguish internal from external room bookings, apply the following Automatic Formatting rule:

Formatting Rule Name	Field	Condition	Value	Font Format
Internal	Categories	Is(exactly)	Internal	Blue

8. Exit the View Summary and from the Format Columns dialog box modify the following fields as shown:

Field name	New name	Format
Subject	Booking For:	
Start	Date	Date only
End	End	Time only

What Just Happened?

We have created the basic view as described and the fields will operate as follows:

- The Start Time field repeats the Start field but formats the contents to show only the hours and minutes, ("h:mm"). Outlook does not allow you to place a field in the header area more than once but you achieve this by placing the field that you wish to repeat within a custom field.
- The Room Chrg field will automatically return the room fee depending on the room number entered in the Location field. The Format function ensures that the result is formatted as currency; so £10.00 for Room 1, £30.00 for Room 2 and £15.00 for Room 3. If no room number is entered in the Location field, this field will return "Rate?", indicating that a rate cannot be determined unless a room number is entered.
- The formula in the Total Fee field is dependent upon the creation of the two new categories, Internal and External, and meeting room bookings in the calendar being assigned accordingly. The formula says that if the item is

an external room booking (i.e. the calendar item has been assigned the External category) the charge should be calculated as the Room Chrg multiplied by the Duration, divided by 60. It is necessary to divide the Duration by 60 because the Duration field actually holds time values in minutes even though it may display in hours. This part of the calculation is enclosed with the Format(....."Currency") function so that the result will be in currency format. If the calendar item is assigned to the Internal category the field returns the word Internal. This assumes that no charges are levied for internal bookings.

- The three manual address line fields have been concatenated into the single Address field to save space in the view and can be removed from the view by dragging them off the field header bar. However, three separate address line fields are required so that they can appear on separate lines in the merge to the Word invoice template described later.

The Result

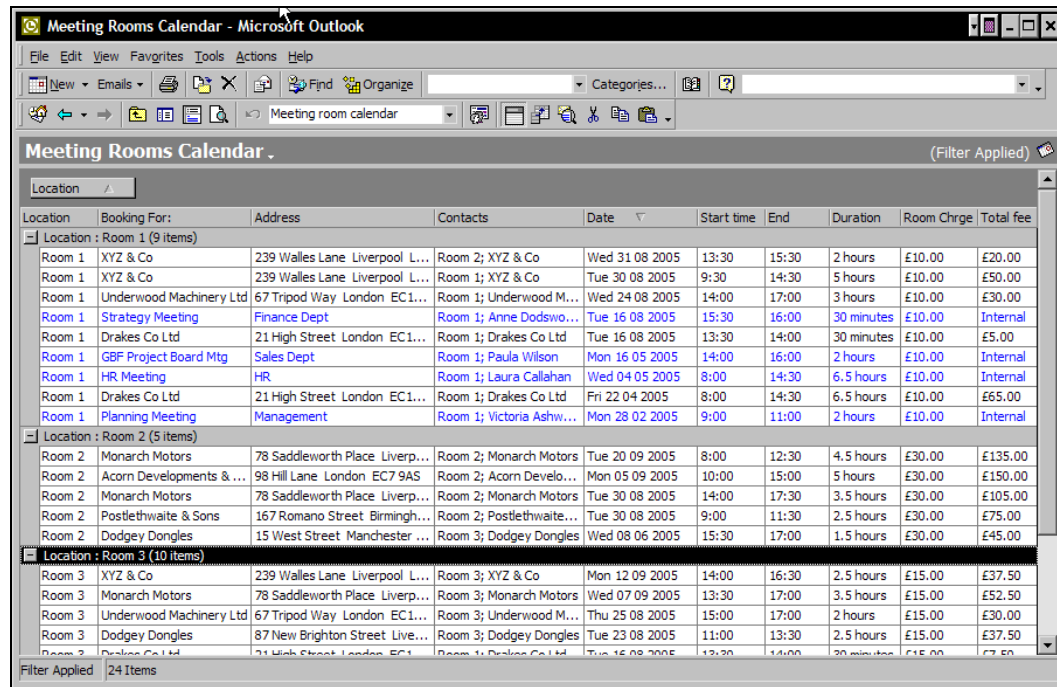
With all the fields in place, you can enter bookings into the Meeting Rooms Calendar in the usual Day/Week/Month view and then switch to the Meeting room calendar view to obtain a condensed view of all current and future meeting room bookings. The external reservations have the charge already calculated and the internal bookings are in blue font with no charge.

Location	Booking For:	Address	Contacts	Date	Start time	End	Duration	Room Chrg	Total fee
Room 1	XYZ & Co	239 Wallis Lane Liverpool L...	Room 1; XYZ & Co	Tue 30 08 2005	9:30	14:30	5 hours	£10.00	£50.00
Room 2	Postlethwaite & Sons	167 Romano Street Birmingham...	Room 2; Postlethwaite ...	Tue 30 08 2005	9:00	11:30	2.5 hours	£30.00	£75.00
Room 3	Underwood Machinery Ltd	67 Tripod Way London EC1...	Room 3; Underwood M...	Thu 25 08 2005	15:00	17:00	2 hours	£15.00	£30.00
Room 1	Underwood Machinery Ltd	67 Tripod Way London EC1...	Room 1; Underwood M...	Wed 24 08 2005	14:00	17:00	3 hours	£10.00	£30.00
Room 3	Dodgey Dingles	87 New Brighton Street Liver...	Room 3; Dodgey Dingles	Tue 23 08 2005	11:00	13:30	2.5 hours	£15.00	£37.50
Room 1	Strategy Meeting	Finance Dept	Room 1; Anne Dodsworth	Tue 16 08 2005	15:30	16:00	30 minutes	£10.00	Internal
Room 1	Drakes Co Ltd	21 High Street London EC10...	Room 1; Drakes Co Ltd	Tue 16 08 2005	13:30	14:00	30 minutes	£10.00	£5.00
Room 3	Drakes Co Ltd	21 High Street London EC10...	Room 1; Drakes Co Ltd	Tue 16 08 2005	13:30	14:00	30 minutes	£15.00	£7.50
Room 2	Dodgey Dingles	15 West Street Manchester ...	Room 3; Dodgey Dingles	Wed 08 06 2005	15:30	17:00	1.5 hours	£30.00	£45.00
Room 1	GBF Project Board Mtg	Sales Dept	Room 1; Paula Wilson	Mon 16 05 2005	14:00	16:00	2 hours	£10.00	Internal
Room 3	Drakes Co Ltd	21 High Street London EC10...	Room 3; Drakes Co Ltd	Thu 05 05 2005	12:00	14:00	2 hours	£15.00	£30.00
Room 1	HR Meeting	HR	Room 1; Laura Callahan	Wed 04 05 2005	8:00	14:30	6.5 hours	£10.00	Internal
Room 1	Drakes Co Ltd	21 High Street London EC10...	Room 1; Drakes Co Ltd	Fri 22 04 2005	8:00	14:30	6.5 hours	£10.00	£65.00
Room 3	Dodgey Dingles	15 West Street Manchester ...	Room 3; Dodgey Dingles	Wed 20 04 2005	10:00	12:00	2 hours	£15.00	£30.00
Room 3	Drakes Co Ltd	21 High Street London EC10...	Room 3; Drakes Co Ltd	Mon 18 04 2005	11:30	14:00	2.5 hours	£15.00	£37.50
Room 3	Drakes Co Ltd	21 High Street London EC10...	Room 3; Drakes Co Ltd	Tue 01 03 2005	11:00	13:30	2.5 hours	£15.00	£37.50
Room 3	Marketing meeting	Sales Dept	Room 3; Laura Callahan	Mon 28 02 2005	9:00	15:00	6 hours	£15.00	Internal
Room 1	Planning Meeting	Management	Room 1; Victoria Ashw...	Mon 28 02 2005	9:00	11:00	2 hours	£10.00	Internal

Whole Solutions

This view does not group the bookings in any way, but other views can be created based upon this view that show the bookings grouped in various ways, or grouping can be achieved by dragging the appropriate field to the Group By area. Useful booking schedules can then be printed.

The following screenshots display groupings with respect to Location, Booking For, Date, and Categories respectively:



Meeting Rooms Calendar - Microsoft Outlook

File Edit View Favorites Tools Actions Help

New Emails Find Organize Categories...

Meeting room calendar

Meeting Rooms Calendar (Filter Applied)

Location

Location	Booking For:	Address	Contacts	Date	Start time	End	Duration	Room Chrg	Total fee
Location: Room 1 (9 items)									
Room 1	XYZ & Co	239 Wallis Lane Liverpool L...	Room 2; XYZ & Co	Wed 31 08 2005	13:30	15:30	2 hours	£10.00	£20.00
Room 1	XYZ & Co	239 Wallis Lane Liverpool L...	Room 1; XYZ & Co	Tue 30 08 2005	9:30	14:30	5 hours	£10.00	£50.00
Room 1	Underwood Machinery Ltd	67 Tripod Way London EC1...	Room 1; Underwood M...	Wed 24 08 2005	14:00	17:00	3 hours	£10.00	£30.00
Room 1	Strategy Meeting	Finance Dept	Room 1; Anne Dodsw...	Tue 16 08 2005	15:30	16:00	30 minutes	£10.00	Internal
Room 1	Drakes Co Ltd	21 High Street London EC1...	Room 1; Drakes Co Ltd	Tue 16 08 2005	13:30	14:00	30 minutes	£10.00	£5.00
Room 1	GBF Project Board Mtg	Sales Dept	Room 1; Paula Wilson	Mon 16 05 2005	14:00	16:00	2 hours	£10.00	Internal
Room 1	HR Meeting	HR	Room 1; Laura Callahan	Wed 04 05 2005	8:00	14:30	6.5 hours	£10.00	Internal
Room 1	Drakes Co Ltd	21 High Street London EC1...	Room 1; Drakes Co Ltd	Fri 22 04 2005	8:00	14:30	6.5 hours	£10.00	£65.00
Room 1	Planning Meeting	Management	Room 1; Victoria Ashw...	Mon 28 02 2005	9:00	11:00	2 hours	£10.00	Internal
Location: Room 2 (5 items)									
Room 2	Monarch Motors	78 Saddleworth Place Liverp...	Room 2; Monarch Motors	Tue 20 09 2005	8:00	12:30	4.5 hours	£30.00	£135.00
Room 2	Acorn Developments & ...	98 Hill Lane London EC7 9AS	Room 2; Acorn Develo...	Mon 05 09 2005	10:00	15:00	5 hours	£30.00	£150.00
Room 2	Monarch Motors	78 Saddleworth Place Liverp...	Room 2; Monarch Motors	Tue 30 08 2005	14:00	17:30	3.5 hours	£30.00	£105.00
Room 2	Postlethwaite & Sons	167 Romano Street Birmingh...	Room 2; Postlethwaite...	Tue 30 08 2005	9:00	11:30	2.5 hours	£30.00	£75.00
Room 2	Dodgey Dongles	15 West Street Manchester ...	Room 3; Dodgey Dongles	Wed 08 06 2005	15:30	17:00	1.5 hours	£30.00	£45.00
Location: Room 3 (10 items)									
Room 3	XYZ & Co	239 Wallis Lane Liverpool L...	Room 3; XYZ & Co	Mon 12 09 2005	14:00	16:30	2.5 hours	£15.00	£37.50
Room 3	Monarch Motors	78 Saddleworth Place Liverp...	Room 3; Monarch Motors	Wed 07 09 2005	13:30	17:00	3.5 hours	£15.00	£52.50
Room 3	Underwood Machinery Ltd	67 Tripod Way London EC1...	Room 3; Underwood M...	Thu 25 08 2005	15:00	17:00	2 hours	£15.00	£30.00
Room 3	Dodgey Dongles	87 New Brighton Street Live...	Room 3; Dodgey Dongles	Tue 23 08 2005	11:00	13:30	2.5 hours	£15.00	£37.50
Room 3	Drakes Co Ltd	21 High Street London EC1...	Room 1; Drakes Co Ltd	Tue 16 08 2005	13:30	14:00	30 minutes	£15.00	£7.50

Filter Applied 24 Items

Meeting Rooms Calendar - Microsoft Outlook

File Edit View Favorites Tools Actions Help

New Emails Find Organize Categories...

Meeting room calendar

(Filter Applied)

Booking For: /

Location	Booking For:	Address	Contacts	Date	Start time	End	Duration	Room Chrg	Total fee
Booking For: Acorn Developments & Assoc (1 item)									
Room 2	Acorn Developments & ...	98 Hill Lane London EC7 9AS	Room 2; Acorn Develo...	Mon 05 09 2005	10:00	15:00	5 hours	£30.00	£150.00
Booking For: Dodgey Dongles (3 items)									
Room 3	Dodgey Dongles	87 New Brighton Street Live...	Room 3; Dodgey Dongles	Tue 23 08 2005	11:00	13:30	2.5 hours	£15.00	£37.50
Room 2	Dodgey Dongles	15 West Street Manchester ...	Room 3; Dodgey Dongles	Wed 08 06 2005	15:30	17:00	1.5 hours	£30.00	£45.00
Room 3	Dodgey Dongles	15 West Street Manchester ...	Room 3; Dodgey Dongles	Wed 20 04 2005	10:00	12:00	2 hours	£15.00	£30.00
Booking For: Drakes Co Ltd (6 items)									
Room 1	Drakes Co Ltd	21 High Street London EC1...	Room 1; Drakes Co Ltd	Tue 16 08 2005	13:30	14:00	30 minutes	£10.00	£5.00
Room 3	Drakes Co Ltd	21 High Street London EC1...	Room 1; Drakes Co Ltd	Tue 16 08 2005	13:30	14:00	30 minutes	£15.00	£7.50
Room 3	Drakes Co Ltd	21 High Street London EC1...	Room 3; Drakes Co Ltd	Thu 05 05 2005	12:00	14:00	2 hours	£15.00	£30.00
Room 1	Drakes Co Ltd	21 High Street London EC1...	Room 1; Drakes Co Ltd	Fri 22 04 2005	8:00	14:30	6.5 hours	£10.00	£65.00
Room 3	Drakes Co Ltd	21 High Street London EC1...	Room 3; Drakes Co Ltd	Mon 18 04 2005	11:30	14:00	2.5 hours	£15.00	£37.50
Room 3	Drakes Co Ltd	21 High Street London EC1...	Room 3; Drakes Co Ltd	Tue 01 03 2005	11:00	13:30	2.5 hours	£15.00	£37.50
Booking For: GBF Project Board Mtg (1 item)									
Room 1	GBF Project Board Mtg	Sales Dept	Room 1; Paula Wilson	Mon 16 05 2005	14:00	16:00	2 hours	£10.00	Internal
Booking For: HR Meeting (1 item)									
Room 1	HR Meeting	HR	Room 1; Laura Callahan	Wed 04 05 2005	8:00	14:30	6.5 hours	£10.00	Internal
Booking For: Marketing meeting (1 item)									
Room 3	Marketing meeting	Sales Dept	Room 3; Laura Callahan	Mon 28 02 2005	9:00	15:00	6 hours	£15.00	Internal

Filter Applied | 24 Items

Meeting Rooms Calendar - Microsoft Outlook

File Edit View Favorites Tools Actions Help

New Emails Find Organize Categories...

Meeting room calendar

(Filter Applied)

Date

Location	Booking For:	Address	Contacts	Date	Start time	End	Duration	Room Chrg	Total fee
Date: 23 August 2005 11:00 (1 item)									
Room 3	Dodgey Dongles	87 New Brighton Street Live...	Room 3; Dodgey Dongles	Tue 23 08 2005	11:00	13:30	2.5 hours	£15.00	£37.50
Date: 16 August 2005 15:30 (1 item)									
Room 1	Strategy Meeting	Finance Dept	Room 1; Anne Dodsw...	Tue 16 08 2005	15:30	16:00	30 minutes	£10.00	Internal
Date: 16 August 2005 13:30 (2 items)									
Room 1	Drakes Co Ltd	21 High Street London EC1...	Room 1; Drakes Co Ltd	Tue 16 08 2005	13:30	14:00	30 minutes	£10.00	£5.00
Room 3	Drakes Co Ltd	21 High Street London EC1...	Room 1; Drakes Co Ltd	Tue 16 08 2005	13:30	14:00	30 minutes	£15.00	£7.50
Date: 08 June 2005 15:30 (1 item)									
Date: 16 May 2005 14:00 (1 item)									
Date: 05 May 2005 12:00 (1 item)									
Date: 04 May 2005 08:00 (1 item)									
Date: 22 April 2005 08:00 (1 item)									
Date: 20 April 2005 10:00 (1 item)									
Date: 18 April 2005 11:30 (1 item)									
Date: 01 March 2005 11:00 (1 item)									
Date: 28 February 2005 09:00 (2 items)									

Filter Applied | 24 Items

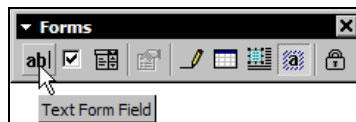
Location	Booking For:	Address	Contacts	Date	Start time	End	Duration	Room Chrg	Total fee
Categories : Internal (5 items)									
Room 1	Strategy Meeting	Finance Dept	Room 1; Anne Dodsw...	Tue 16 08 2005	15:30	16:00	30 minutes	£10.00	Internal
Room 1	GBF Project Board Mtg	Sales Dept	Room 1; Paula Wilson	Mon 16 05 2005	14:00	16:00	2 hours	£10.00	Internal
Room 1	HR Meeting	HR	Room 1; Laura Callahan	Wed 04 05 2005	8:00	14:30	6.5 hours	£10.00	Internal
Room 3	Marketing meeting	Sales Dept	Room 3; Laura Callahan	Mon 28 02 2005	9:00	15:00	6 hours	£15.00	Internal
Room 1	Planning Meeting	Management	Room 1; Victoria Ashw...	Mon 28 02 2005	9:00	11:00	2 hours	£10.00	Internal
Categories : External (19 items)									
Room 2	Monarch Motors	78 Saddleworth Place Liverp...	Room 2; Monarch Motors	Tue 20 09 2005	8:00	12:30	4.5 hours	£30.00	£135.00
Room 3	XYZ & Co	239 Wallis Lane Liverpool L...	Room 3; XYZ & Co	Mon 12 09 2005	14:00	16:30	2.5 hours	£15.00	£37.50
Room 3	Monarch Motors	78 Saddleworth Place Liverp...	Room 3; Monarch Motors	Wed 07 09 2005	13:30	17:00	3.5 hours	£15.00	£52.50
Room 2	Acorn Developments & ...	98 Hill Lane London EC7 9AS	Room 2; Acorn Develo...	Mon 05 09 2005	10:00	15:00	5 hours	£30.00	£150.00
Room 1	XYZ & Co	239 Wallis Lane Liverpool L...	Room 2; XYZ & Co	Wed 31 08 2005	13:30	15:30	2 hours	£10.00	£20.00
Room 2	Monarch Motors	78 Saddleworth Place Liverp...	Room 2; Monarch Motors	Tue 30 08 2005	14:00	17:30	3.5 hours	£30.00	£105.00
Room 1	XYZ & Co	239 Wallis Lane Liverpool L...	Room 1; XYZ & Co	Tue 30 08 2005	9:30	14:30	5 hours	£10.00	£50.00
Room 2	Postlethwaite & Sons	167 Romano Street Birmingh...	Room 2; Postlethwaite...	Tue 30 08 2005	9:00	11:30	2.5 hours	£30.00	£75.00
Room 3	Underwood Machinery Ltd	67 Trind Way London EC1	Room 3; Underwood M	Thu 25 08 2005	15:00	17:00	2 hours	£15.00	£30.00

Invoicing Meeting Room Bookings

We are now going to add a page to the appointments form (meeting room booking) in the Meeting Rooms Calendar folder. The added page will contain extra details of the room booking and a print button that will run code to activate an invoice template. Fields from the Outlook calendar item will merge with the Word invoice template to produce an invoice for the room hire. The invoice can then be saved and printed.

To produce the Word template, we will require a basic template for an invoice and the insertion in the appropriate places of a Word text form field for each of the Outlook fields.

Text form fields are inserted into a Word document by clicking the Text Form Field button on the Forms toolbar in Word. By right-clicking on each inserted text form field and choosing Properties you can make a note of the Bookmark name (Text1, Text2, etc.) of each field for use in the following code and set the formatting of the data that will appear in the field. The formatting for the fields in this example is detailed further on in this text.




Once we have added the extra page to the meeting room booking form, the form will have an extra tab named Print and the Print page of the Appointment Form will look something like the screenshot shown opposite.

Creating the Appointment Form

1. Open a new appointment form in the Meeting Rooms Calendar folder and access design mode from Tools | Forms | Design This Form.
2. Click the tab (P.2) and first make it visible from Form | Display This Page, then rename it Print from Form | Rename Page.
3. From the Field Chooser dialog box, drag the Duration field onto the form and, under User-defined fields in folder, drag and place on the form the five fields we created, Room Chrg, Total Fee, Add Line 1, Add Line 2, and Add Line 3.
4. Create the following new field:

Name	In the Formula Field window
Meeting Duration	[Duration]/60

Do not drag this field on to the form. We are using the Outlook Duration field on the form because it will display the time span in hours. We cannot use the Outlook Duration field for the Word template because it will revert to its underlying format of minutes. The Meeting Duration field we have just created will remain as a 'user-defined field in this folder' and will be picked up by the following code and used in the 8th bookmark. This field will be used just for the merge into the Word template and will ensure that the duration of the meeting will be shown as hours in the final invoice.

5. From the Control Toolbox drag a Command Button onto the form.
6. Right-click on the CommandButton and change the caption to read Print Invoice.
7. To add the print code behind the CommandButton, click the View Code button on the Form Design toolbar,  and add the following code in the Script Editor:

```
Sub cmdPrint_Click()  
    Set oWordApp = CreateObject("Word.Application")  
    If oWordApp Is Nothing Then  
        MsgBox "Couldn't start Word."  
    Else  
        Dim oWordApp  
        Dim oWordDoc  
        Dim bolPrintBackground  
  
        ' Open new document  
        Set oDoc = oWordApp.Documents.Add("C:\Documents and  
Settings\UserName\Application Data\Microsoft\Templates\Room Hire  
Invoice.dot")  
  
        ' Set 1st bookmark to contact's Name  
        oDoc.FormFields("Text1").Result = CStr(Item.Subject)  
  
        ' Set 2nd bookmark to Address Line 1  
        strMyField = Item.UserProperties.Find("Add Line 1")  
        oDoc.FormFields("Text2").Result = strMyField  
  
        ' Set 3rd bookmark to Address Line 2  
        strMyField1 = Item.UserProperties.Find("Add Line 2")  
        oDoc.FormFields("Text3").Result = strMyField1  
  
        ' Set 4th bookmark to Address Line 3  
        strMyField2 = Item.UserProperties.Find("Add Line 3")  
        oDoc.FormFields("Text4").Result = strMyField2  
  
        ' Set 5th bookmark to the Room  
        oDoc.FormFields("Text5").Result = CStr(Item.Location)  
  
        ' Set 6th bookmark to the booking's start date & time  
        oDoc.FormFields("Text6").Result = CStr(Item.Start)  
  
        ' Set 7th bookmark to the booking's end date & time  
        oDoc.FormFields("Text7").Result = CStr(Item.End)  
  
        ' Set 8th bookmark to the booking duration  
        strMyField3 = Item.UserProperties.Find("Meeting  
Duration")  
        oDoc.FormFields("Text8").Result = strMyField3  
  
        ' Set 9th bookmark to the Room Rate per hour  
        strMyField4 = Item.UserProperties.Find("Room Chrg")  
        oDoc.FormFields("Text9").Result = strMyField4  
  
        ' Set 10th bookmark to the Total Charge
```

```

        strMyField5 = Item.UserProperties.Find("Total fee")
oDoc.Fields("Text10").Result = strMyField5

' Set 11th bookmark to the Amount Due
        strMyField5 = Item.UserProperties.Find("Total fee")
oDoc.Fields("Text11").Result = strMyField5

' Set 12th bookmark to the Invoice Date
        oDoc.Fields("Text12").Result = CStr(Item.End)

```

```
oWordApp.Visible=True
```

```

        Set oDoc = Nothing
        Set oWordApp = Nothing
    End If
End Sub

```

8. Close the Script Editor, open the Tools menu in the form, still in Design mode, and select Forms | Publish Form As and name and publish the form to the Meeting Rooms Calendar folder.
9. In the General tab of the Properties of the Meeting Rooms Calendar folder, open the When posting to this folder, use: drop-down box, and select the Meeting Room form. This will tell Outlook to use this form when creating new items in this folder.
10. You will need to alter the tenth line of the previous code to the path of the Word invoice template on your system and print the invoice on company headed paper.

What Just Happened?

The shaded fields in the Word template are all the Form Text Fields that were inserted into the invoice template and these have been assigned the Word bookmark names e.g. Text1 etc. The code behind the Outlook form is locating those bookmarks, e.g.

```
oDoc.Fields("Text1")
```

and is inserting the Outlook fields e.g. CStr(Item.Subject).

For the custom, user-defined fields the following syntax is used to find those fields and to transfer the field contents (e.g. Add Line 1) to the Word bookmarks (e.g. Text2) on the form:

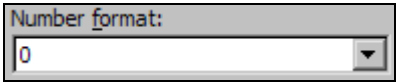
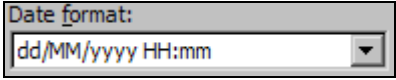
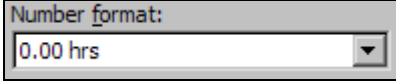
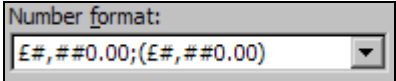
```

strMyField = Item.UserProperties.Find("Add Line 1")
oDoc.Fields("Text2").Result = strMyField

```


You will notice that the End Date field [CStr(Item.End)] has been used twice in the code, first as the date of the invoice (formatted as date only) and secondly as the end date for the room booking (formatted as date and time).

The remaining formats of the Word text form's fields are as follows:

Word Text Form Field	Type	Format
Add Line fields	Regular text	No special formatting; text will appear as entered
Room Number	Number	
Start and End fields	Date	
Duration	Number	 The standard number format 0.00 is used with the hrs suffix.
Room Rate per hour, Charge & Amount Due	Number	

The Result

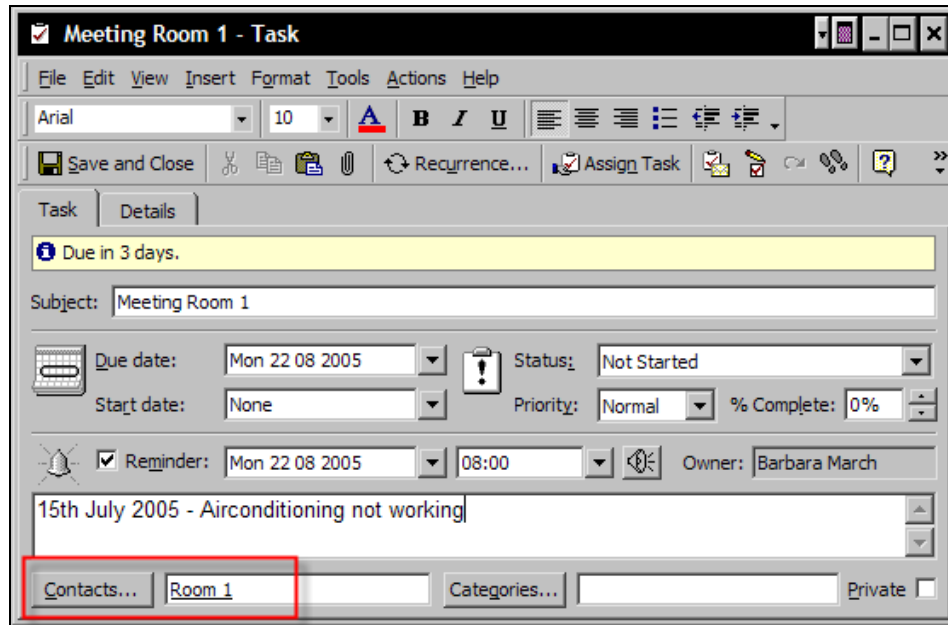
The Word form template that we have created when printed on the letter headed paper of our fictitious company "Our Company Ltd." would produce the invoice as shown below:

Our Company Ltd											
Invoice											
TO: Underwood Machinery Ltd Text1 67 Tripod Way Text2 London Text3 EC15 9LK Text4											
DATE: 25 August 2005 Text12											
<u>RE: Room Hire</u> Meeting Room No. 3 Text5											
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: center;">Start Date & Time:</th> <th style="text-align: center;">End Date & Time:</th> <th style="text-align: center;">Duration:</th> <th style="text-align: center;">Room Rate Per hour:</th> <th style="text-align: center;">Charge:</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">25/08/2005 15:00</td> <td style="text-align: center;">25/08/2005 17:00</td> <td style="text-align: center;">2.00 hrs</td> <td style="text-align: center;">£15.00</td> <td style="text-align: center;">£30.00</td> </tr> </tbody> </table> <div style="display: flex; justify-content: space-around; margin-top: 5px;"> Text6 Text7 Text8 Text9 Text10 </div>		Start Date & Time:	End Date & Time:	Duration:	Room Rate Per hour:	Charge:	25/08/2005 15:00	25/08/2005 17:00	2.00 hrs	£15.00	£30.00
Start Date & Time:	End Date & Time:	Duration:	Room Rate Per hour:	Charge:							
25/08/2005 15:00	25/08/2005 17:00	2.00 hrs	£15.00	£30.00							
<u>Amount Due = £30.00</u> Text11											
Signed For & on Behalf of Our Company											

Meeting Room Maintenance

We can also include in this solution the means to track the repair and updating of meeting room facilities by creating Tasks for maintenance items.

For example, a task can be created for an air conditioning fault that is reported for meeting Room 1.



To enable updating by the maintenance crew, the task is created in the default Tasks folder and it is also linked via the Contacts button to Room 1 in the Meeting Rooms Contacts folder.

The Meeting Rooms Contacts folder is linked to the default Tasks folder so that the Activities tab of the Room 1 contact record will display a history of maintenance items for that room.

Room 1 - Contact

File Edit View Insert Format Tools Actions Help

Arial 10

Save and Close Move

General Details Activities Certificates All Fields

Show: Room Maintenance Stop

<input checked="" type="checkbox"/> Notes	Due Date	Owner	% Complete
Complete : No (3 items)			
<input type="checkbox"/> Refill flip chart paper	Fri 23 09 2005	Barbara March	0%
<input type="checkbox"/> Data Projector needs adjustment	Tue 20 09 2005	Barbara March	0%
<input type="checkbox"/> Airconditioning still not working properly	Tue 27 09 2005	Barbara March	0%
Complete : Yes (3 items)			
<input checked="" type="checkbox"/> 15th July 2005 - Airconditioning not working	Mon 22-08-2005	Barbara March	100%
<input checked="" type="checkbox"/> Window blinds broken	Tue 23-08-2005	Barbara March	100%
<input checked="" type="checkbox"/> Airconditioning not working	Tue 20-09-2005	Barbara March	100%

We can now monitor, for example, how many times the air conditioning in Room 1 has been repaired and the Owner field will tell us who is responsible for this. We can track the progress of maintenance items and determine if the room is ready to be used.

Using the Meeting Room Solution

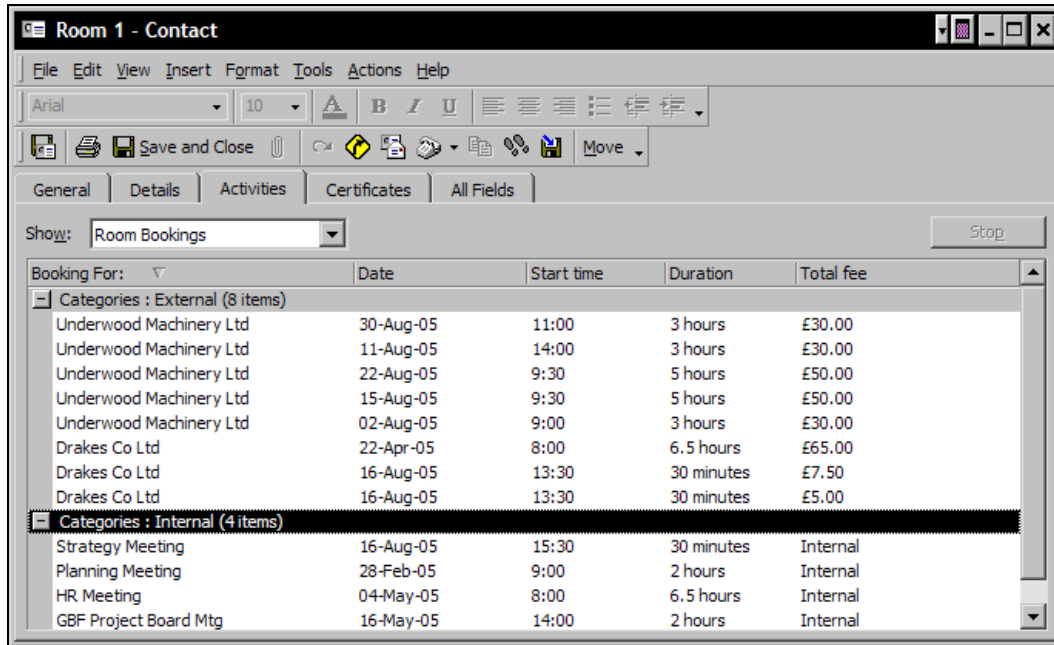
Open a new form in the Meeting Rooms Calendar. This will be a blank, custom, meeting room form that we created specifically for the Meeting room calendar. Complete the fields on the Appointment page, and on the Print page of the form, if it is an external booking, manually enter the postal address of the client in the Add Line fields 1, 2 and 3. If it is an internal booking, complete just the first address line with the name of the department in your company that is booking the room. Outlook will pick up the dates from the dates of the booking, will calculate the cost of the room hire, and display the details in the corresponding fields on the Print page.

For all this to work properly, it is important that you remember to:

1. Assign either the Internal or External category
2. Link the booking to the relevant room in the Meetings Rooms' Contacts folder and the contacts record of either the company that is hiring the room (external booking) or, for an internal booking, the relevant person in your company

By linking the room booking to the external client company or to the internal staff member, double-clicking on the link within the calendar item will give you access to the details of the hirer should you need to contact them about the booking.

You will be able to view the full bookings record and income history for individual rooms from the **Activities** tab of the room contact record:



Booking For:	Date	Start time	Duration	Total fee
Categories : External (8 items)				
Underwood Machinery Ltd	30-Aug-05	11:00	3 hours	£30.00
Underwood Machinery Ltd	11-Aug-05	14:00	3 hours	£30.00
Underwood Machinery Ltd	22-Aug-05	9:30	5 hours	£50.00
Underwood Machinery Ltd	15-Aug-05	9:30	5 hours	£50.00
Underwood Machinery Ltd	02-Aug-05	9:00	3 hours	£30.00
Drakes Co Ltd	22-Apr-05	8:00	6.5 hours	£65.00
Drakes Co Ltd	16-Aug-05	13:30	30 minutes	£7.50
Drakes Co Ltd	16-Aug-05	13:30	30 minutes	£5.00
Categories : Internal (4 items)				
Strategy Meeting	16-Aug-05	15:30	30 minutes	Internal
Planning Meeting	28-Feb-05	9:00	2 hours	Internal
HR Meeting	04-May-05	8:00	6.5 hours	Internal
GBF Project Board Mtg	16-May-05	14:00	2 hours	Internal

The following screenshot shows the external bookings history of the hirer:

The screenshot shows a window titled 'Underwood Machinery Ltd - Contact'. It has a menu bar (File, Edit, View, Insert, Format, Tools, Actions, Help) and a toolbar with various icons. Below the toolbar are tabs for 'General', 'Details', 'Activities', 'Certificates', and 'All Fields'. The 'Show:' dropdown is set to 'Room Bookings'. A table displays the booking history.

Location	Start	Room Chrg	Duration	Total fee
Room 1	Tue 02 08 2005 09:00	£10.00	3 hours	£30.00
Room 1	Thu 11 08 2005 14:00	£10.00	3 hours	£30.00
Room 1	Mon 15 08 2005 09:30	£10.00	5 hours	£50.00
Room 1	Mon 22 08 2005 09:30	£10.00	5 hours	£50.00
Room 1	Tue 30 08 2005 11:00	£10.00	3 hours	£30.00
Room 2	Mon 08 08 2005 11:00	£5.00	3 hours	£15.00
Room 3	Tue 23 08 2005 15:00	£15.00	2 hours	£30.00
Room 3	Thu 25 08 2005 10:00	£15.00	4 hours	£60.00
Room 4	Wed 17 08 2005 13:00	£30.00	3.5 hours	£105.00

The following screenshot shows the internal bookings history of the hirer:

The screenshot shows a window titled 'Laura Callahan - Contact'. It has a menu bar (File, Edit, View, Insert, Format, Tools, Actions, Help) and a toolbar with various icons. Below the toolbar are tabs for 'General', 'Details', 'Activities', 'Certificates', and 'All Fields'. The 'Show:' dropdown is set to 'Meeting Room Bookings'. A table displays the booking history.

Contacts	Subject	Start	End	Duration	Categories
Room 3;...	Marketing meeting	Mon 28 02 2005 09:00	15:00	6 hours	Internal
Room 1;...	HR Meeting	Wed 04 05 2005 08:00	14:30	6.5 hours	Internal

Invoicing Room Bookings

To invoice an external room booking, open the booking appointment in the **Meetings Rooms Calendar**, click the **Print** tab and click the **Print Invoice** button. All the details of the booking will be transferred to the Word invoice template and the invoice document will open with all the fields complete. You are then able to print and save the invoice like any other Word document.

Unfortunately, Outlook does not allow you to print a list or schedule of the items appearing on the **Activities** tab of a contacts record to create a statement to present to clients.

However, you can create individual views of the **Meetings Rooms' Calendar** folder that will filter by client and by current month, to produce a statement of room bookings per client.

For example the **Underwood Machinery** company has made several meeting room bookings as the **Activities** tab of its contact record shows in the screenshot overleaf and they will have been invoiced for each separate booking.

If, at the end of August, we wanted to send the client a statement of all the bookings and invoices for August we would need to create the following view of the **Meeting room calendar** that filtered meetings for the **Underwood Machinery** company in August.

Creating the Calendar View for Bookings and Invoices

1. From the **Define Views | Copy** option, copy the **Meeting room calendar** view and name the copy view (in this instance) **Underwood Mach Statement**.
2. From the **Filter | Appointments and Meetings** tab create the first filter:

Search for the word(s)	in
Underwood	subject field only

3. From the **Filter | Advanced** tab create the second filter:

Field	Condition	Value
Start	Between	1/8/05 and 31/8/05

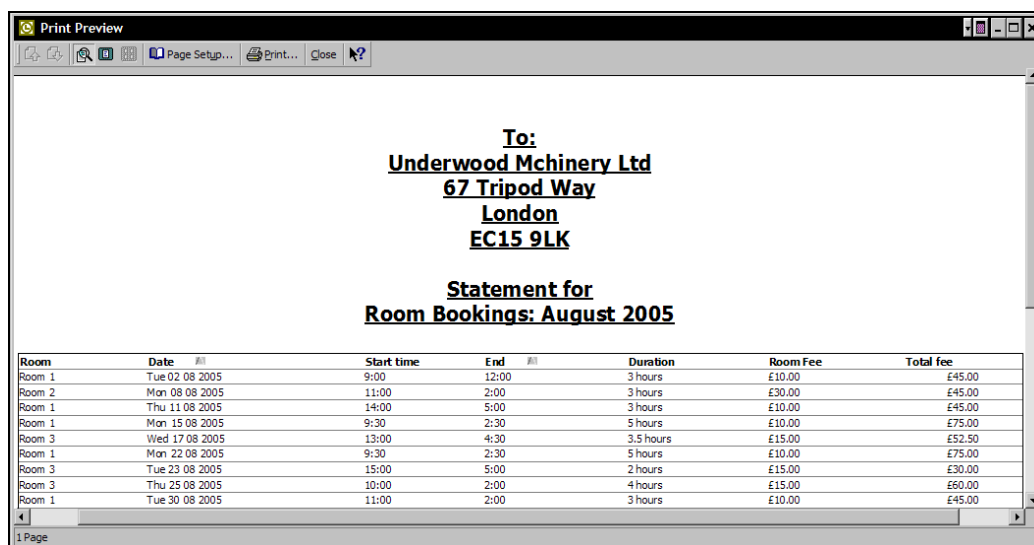
4. Set up the **Print Preview** of this view with a suitable header and print the statement on company headed paper:

What Just Happened?

We have worked through a way of using Outlook to manage meeting rooms and their bookings. This method could be applied to other forms of room hire, for example, booking rooms in a small hotel or guesthouse; the rate would be per day and not per hour and there would be other charges to be included, but the principle would be the same.

The Result

The following is the Print Preview of the Statement of Bookings done in the month of August 2005:



Room	Date	Start time	End	Duration	Room Fee	Total fee
Room 1	Tue 02 08 2005	9:00	12:00	3 hours	£10.00	£45.00
Room 2	Mon 08 08 2005	11:00	2:00	3 hours	£30.00	£45.00
Room 1	Thu 11 08 2005	14:00	5:00	3 hours	£10.00	£45.00
Room 1	Mon 15 08 2005	9:30	2:30	5 hours	£10.00	£75.00
Room 3	Wed 17 08 2005	13:00	4:30	3.5 hours	£15.00	£52.50
Room 1	Mon 22 08 2005	9:30	2:30	5 hours	£10.00	£75.00
Room 3	Tue 23 08 2005	15:00	5:00	2 hours	£15.00	£30.00
Room 3	Thu 25 08 2005	10:00	2:00	4 hours	£15.00	£60.00
Room 1	Tue 30 08 2005	11:00	2:00	3 hours	£10.00	£45.00

Sales

We can also create a method of managing email orders for Our Company that will automatically group and sort the orders and provide a quick and easy start to the order process.

Our Company manufactures various types of nuts: Topnuts, Hipnuts, Bobnuts, and Dropnuts and the company has instructed its customers to send orders for the various types of nuts by email, stipulating that the email orders must mention the word Order in the subject line and then the variety of nuts being ordered, e.g. Order: Topnut. The body of the email can then go into greater detail about the order including the number of items required. The emails are sent to the Order Clerk at Our Company.

Whole Solutions

The company has a team of salespeople who are responsible for specific customers and they earn commission and bonuses annually on the total values of the orders placed.

The email orders are received in the Order Clerk's Inbox and he/she has created a mail folder specifically for email orders and a custom view of the folder that presents the orders as shown in the next image:

Received	Subject	Quantity	Price	Cost	Discount	Final Cost	VAT	Cost inc VAT	Cost B/Down	Running Sum per 1/4
From : Betterfit & Sons (8 items)										
Salesperson : Davolio Nancy (8 items)										
10-Jan-04	Order: Bobnut	5500	£0.25	£1,375.00	0	£1,375.00	£240.63	£1,615.63	£0.00	£1,375.00
12-Feb-04	Order: Hipnut	10000	£0.75	£7,500.00	£375.00	£7,125.00	£1,246.88	£8,371.88	£1,375.00	£8,500.00
22-Apr-04	Order: Topnut	10000	£1.00	£10,000.00	£500.00	£9,500.00	£1,662.50	£11,162.50	£0.00	£9,500.00
16-Jun-04	Order: Hipnut	50000	£0.75	£37,500.00	£1,875.00	£35,625.00	£6,234.38	£41,859.38	£9,500.00	£45,125.00
15-Aug-04	Order: Topnut	35000	£1.00	£35,000.00	£1,750.00	£33,250.00	£5,818.75	£39,068.75	£0.00	£33,250.00
02-Sep-04	Order: Topnut	15000	£1.00	£15,000.00	£750.00	£14,250.00	£2,493.75	£16,743.75	£33,250.00	£47,500.00
10-Oct-04	Order: Bobnut	20000	£0.25	£5,000.00	0	£5,000.00	£875.00	£5,875.00	£0.00	£5,000.00
30-Nov-04	Order: Topnut	25000	£1.00	£25,000.00	£1,250.00	£23,750.00	£4,156.25	£27,906.25	£5,000.00	£28,750.00
From : Drabbles Plc (14 items)										
Salesperson : Dodsworth Anne (14 items)										
From : Maycare Ltd (7 items)										
Salesperson : King Robert (7 items)										
From : Rison Ltd (4 items)										
Filter Applied 34 Items										

From: Betterfit & Sons
Subject: Order: Bobnut
To: Our Company.com
Cc:
Order: Bobnut x 5500
Delivery Date: ASAP
Delivery To: Betterfit & Sons
Order No: BFO. 1256

Before constructing this folder and view, the following should be created:

1. Categories for each salesperson (the category being the name of the salesperson).
2. Inbox rules for the incoming email orders for each customer. The rules will move emails from specified customers that have Order in the subject line to the Orders folder. The rules will also forward the emails to the appropriate account salesperson and assign the emails to the salesperson's category. For example:

Apply this rule after the message arrives:

From Betterfit & Sons
and with Order in the subject
Assign it to the Davolio Nancy category
and forward it to Davolio Nancy
and move it to the Orders folder

Creating the Orders Mail Folder

1. Create a new Mail folder named Orders.
2. Create a new table-type view from the Define Views | New option and name the view By Customer.
3. In the View Summary dialog box, click Fields, and select the fields: Received, Subject, and Categories, and click OK.
4. We now create the following two new manual fields:

Name	Type	Format	Purpose
Quantity	Number	Raw	To enter manually the quantity of nuts being ordered
Cost B/Down	Currency	2 digits	To bring down manually the previous Final Cost value to create a running sum

5. And the following five formula fields:

Name	In the Formula Field window
Price	Format(If([Subject]="Order: Bobnut",0.25,If([Subject]="Order: Dropnut",0.6,If([Subject]="Order: Hipnut",0.75,If([Subject]="Order: Topnut",1," ")))),"currency")
Cost	Format([Price]*[Quantity],"currency")
Discount	If([Cost]>5000,Format([Cost]*0.05,"currency"),"0")
Final Cost	Format([Cost]-[Discount],"currency")
VAT	Format([Final Cost]*0.175,"currency")
Cost inc VAT	Format([Final Cost]*1.175,"currency")
Running Sum per ¼	Format([Cost B/Down]+[Final Cost],"currency")

6. Set Group By to From, Then by to Categories.
7. Set Sort items by to Received.
8. In Other Settings activate Show Preview Pane (Preview all items in Outlook 2003).
9. From the Filter | Advanced tab create the following filter:

Field	Condition	Value
Received	Between	1/1/04 and 31/12/04

Separate views can be created to filter different time spans, e.g. the current year for daily active use or, as in this case, a previous year to view a full year's sales.

10. From the Automatic Formatting option click Add and create the following formatting rules:

Formatting Rule Name	Field	Condition	Value	Font Format
1 st ¼	Received	Between	1/1/04 and 31/3/04	Green
2 nd ¼	Received	Between	1/4/04 and 30/6/04	Blue
3 rd ¼	Received	Between	1/7/04 and 30/9/04	Purple
4 th ¼	Received	Between	1/10/04 and 31/12/04	Olive

11. Exit the View Summary and from the Format Columns dialog box rename the following field as shown:

Field name	New name
Categories	Salesperson

12. Remove from the view the fields From and Salesperson (Categories) by dragging them from the field header area.
13. Create a link between the Contacts folder that contains the customers' contacts records to the Orders mail folder.
14. Create a Contacts folder each year of sales, for example in this case Sales 2004.
15. Create or copy the contacts records for the salespeople into these folders.

16. Create a new view for these **Contacts** folders that can be used on all **Contacts** folder, from the **Define Views | New** option and name the view **Sales and Commission**.
17. In the **View Summary** dialog box, click **Fields**, and select the field: **File As** and click **OK**.
18. We will now create four new manual fields as follows:

Name	Type	Format	Purpose
2004 1 st ¼	Currency	2 digits	To enter manually the sales figures for the first quarter
2004 2 nd ¼	Currency	2 digits	To enter manually the sales figures for the second quarter
2004 3 rd ¼	Currency	2 digits	To enter manually the sales figures for the third quarter
2004 4 th ¼	Currency	2 digits	To enter manually the sales figures for the fourth quarter

19. And the following three formula fields:

Name	In the Formula Field window
Total Sales	[2004 1st ¼]+[2004 2nd ¼]+[2004 3rd ¼]+[2004 4th ¼]
Commission	Format([Total Sales]*0.01,"Currency")
Bonus	If([Total Sales]>300000,"£5,000.00","")

What Just Happened?

We have created a solution for managing email orders that firstly forwards a copy of the order request to the relevant salesperson and secondly moves the email to an **Orders** folder. The Outlook incoming mail rules and the setup of the view of the **Orders** folder ensure that the emails are grouped first by the customer and then by the salesperson in this folder and the email orders are colored differently according to the quarter of the year in which they are received.

The **Orders Clerk** obtains the quantity being ordered from the preview pane of the emails, and enters that figure into the **Quantity** field.

The formula fields operate as follows:

1. The Price field tests the Subject field of the email and returns the item price according to the item ordered.
2. The Cost field multiplies Cost and Quantity to return the net value of the order.
3. The Discount field calculates a discount of 5% only when the Cost field exceeds £5000 and defaults to zero.
4. The Final Cost field subtracts Discount from Cost.N
5. The VAT field calculates the VAT @ 17.5%.
6. The Total Cost field adds Final Cost and VAT.
7. The Running Sum per ¼ is calculated when the Running Sum per ¼ figure is brought down to the next line.

The Result

Here is the finished view of the Orders mail folder:

Orders - Microsoft Outlook

File Edit View Favorites Tools Actions Help

New Emails Reply Reply to All Send/Receive Find Organize

By Customer

Orders (Filter Applied)

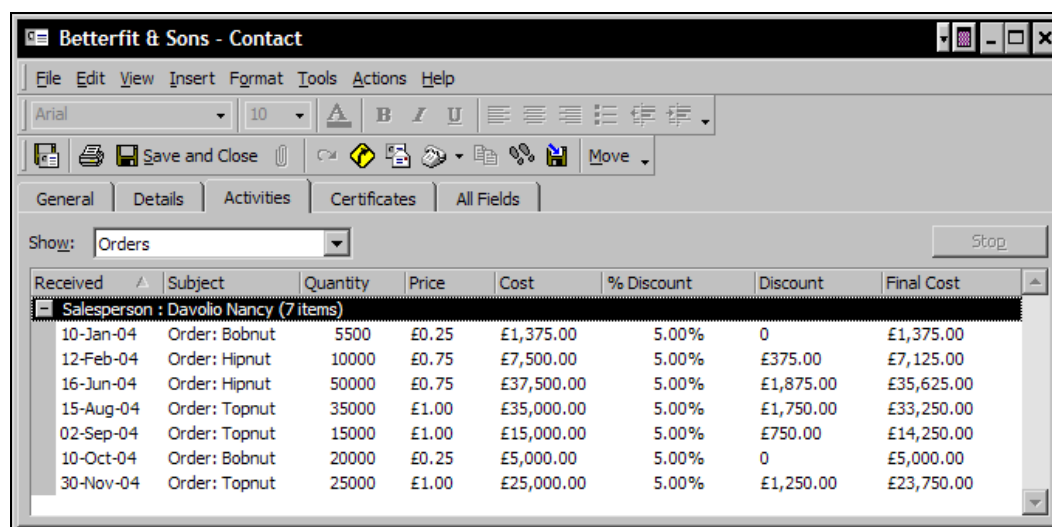
Received	Subject	Quantity	Price	Cost	Discount	Final Cost	VAT	Cost inc VAT	Cost B/Down	Running Sum per ¼
From : Betterfit & Sons (8 items)										
Salesperson : Davolio Nancy (8 items)										
10-Jan-04	Order: Bobnut	5500	£0.25	£1,375.00	0	£1,375.00	£240.63	£1,615.63	£0.00	£1,375.00
12-Feb-04	Order: Hipnut	10000	£0.75	£7,500.00	£375.00	£7,125.00	£1,246.88	£8,371.88	£1,375.00	£8,500.00
22-Apr-04	Order: Topnut	10000	£1.00	£10,000.00	£500.00	£9,500.00	£1,662.50	£11,162.50	£0.00	£9,500.00
16-Jun-04	Order: Hipnut	50000	£0.75	£37,500.00	£1,875.00	£35,625.00	£6,234.38	£41,859.38	£9,500.00	£45,125.00
15-Aug-04	Order: Topnut	35000	£1.00	£35,000.00	£1,750.00	£33,250.00	£5,818.75	£39,068.75	£0.00	£33,250.00
02-Sep-04	Order: Topnut	15000	£1.00	£15,000.00	£750.00	£14,250.00	£2,493.75	£16,743.75	£33,250.00	£47,500.00
10-Oct-04	Order: Bobnut	20000	£0.25	£5,000.00	0	£5,000.00	£875.00	£5,875.00	£0.00	£5,000.00
30-Nov-04	Order: Topnut	25000	£1.00	£25,000.00	£1,250.00	£23,750.00	£4,156.25	£27,906.25	£5,000.00	£28,750.00
From : Drabbles Plc (14 items)										
Salesperson : Dodsworth Anne (14 items)										
From : Maycare Ltd (7 items)										
Salesperson : King Robert (7 items)										
From : Rison Ltd (4 items)										

From: Betterfit & Sons
Subject: Order: Bobnut
To: Our Company.com
Cc:

Order: Bobnut x 5500
 Delivery Date: ASAP
 Delivery To: Betterfit & Sons
 Order No: BFO.1256

Filter Applied 34 Items

The linking of this folder with the customers **Contacts** folder enables the Orders Clerk to view the orders on the **Activities** tab of the individual customers' contact records as shown:



Creating the **Contacts** folder, **Sales 2004**, enables the calculation and recording of sales commission per salesperson. The figures for the fields **2004 1st ¼** to **2004 4th ¼** are taken from the **Running Sum per ¼** field in the **Orders** mail folder.

Transcribing these figures from one set of fields to another is made easier by the color-coding of the different quarters of the year and with the **Orders** folder open in the background and the **Sales 2004** folder open in a new window in the foreground as shown in the screenshot overleaf:

The screenshot shows two overlapping Microsoft Outlook windows. The top window, titled 'Orders - Microsoft Outlook', displays a table of orders. The bottom window, titled 'Sales 2004 - Microsoft Outlook', displays a table of sales data for the year 2004.

Orders Table (from 'Orders - Microsoft Outlook'):

Received	Subject	Quantity	Price	Cost	Discount	Final Cost	VAT	Cost inc VAT	Cost B/Do...	Running Sum pe...
From : Betterfit & Sons (8 items)										
Salesperson : Davolio Nancy (8 items)										
10-Jan...	Order: Bobnut	5500	£0.25	£1,375.00	0	£1,375.00	£240.63	£1,615.63	£0.00	£1,375.00
12-Feb...	Order: Hipnut	10000	£0.75	£7,500.00	£375.00	£7,125.00	£1,246.88	£8,371.88	£1,375.00	£8,500.00
22-Apr...	Order: Topnut	10000	£1.00	£10,000.00	£500.00	£9,500.00	£1,662.50	£11,162.50	£0.00	£9,500.00

Sales 2004 Table (from 'Sales 2004 - Microsoft Outlook'):

File As	2004 1st ¼	2004 2nd ¼	2004 3rd ¼	2004 4th ¼	Total Sales	Commission	Bonus
Davolio, Nancy	£8,500.00	£45,125.00	£47,500.00	£28,750.00	£129,556.25	£1,295.56	
Dodsworth, Anne	£29,925.00	£100,415.00	£166,487.50	£102,932.50	£399,760.00	£3,997.60	£5,000.00
Hernández, Carlos	£50,230.00	£120,356.00	£22,365.00	£225,120.00	£418,071.00	£4,180.71	£5,000.00
King, Robert	£15,642.00	£85,623.00	£100,236.00	£75,200.00	£276,701.00	£2,767.01	
Leverling, Janet	£465,623.00	£22,658.00	£223,652.00	£85,213.00	£797,146.00	£7,971.46	£5,000.00
Peacock, Margaret	£22,356.00	£55,231.50	£123,123.00	£130,256.00	£330,966.50	£3,309.67	£5,000.00
Saavedra, Eduardo	£85,423.00	£75,642.30	£25,680.00	£95,321.00	£282,066.30	£2,820.66	
Suyama, Michael	£65,241.00	£65,895.00	£56,852.00	£65,823.00	£253,811.00	£2,538.11	

The Total Sales field is adding all the sales from the four quarters, the Commission field is calculating a commission for the sales team of 1% of Total Sales and the Bonus is calculated where sales exceed £300,000.

That completes the solution for Our Company and, although it may not fit your company, we are sure that the examples will generate ideas that will produce beneficial solutions.

The Microsoft Outlook Ideas Book

For me, this book is the journal of an exciting voyage of discovery—and it all began with a request for some training in Microsoft Outlook.

Unlike most of the training sessions I had conducted previously, I knew the students very well—the work they did, the environment in which they worked, and the constraints that they worked under. They were not only my students but also my work colleagues. So, knowing that I could direct the instruction to address their specific needs, I began to look deeper into Outlook, hoping to find some useful solutions to the challenges that I knew that my colleagues faced every day.

I was already a proficient Outlook user, but the more research I did, the less I found that I knew and one of the biggest revelations for me was that Outlook could perform calculations! However, how these calculations and other capabilities could be used by ordinary users (i.e. not programmers) seemed not to be documented, anywhere—until now!

I have had a lot of fun putting together these solutions and this book had to be written; these powerful Outlook features should not remain the sole realm of the programmers; we can use them too!

What This Book Covers

Chapter 1 discusses the Outlook Calendar folder and demonstrates ways in which calendar items and folders can be manipulated and presented to provide a valuable and professional, timesaving management tool.

In *Chapter 2*, we customize the view of Contacts records to produce an efficient client-business directory and a detailed and comprehensive personnel database. We also take a huge leap of imagination and explore the use of the Contacts folder to store the details of and manage objects such as company vehicles and meeting rooms.

Chapter 3 looks at Tasks and how they can help us, not only manage the day-to-day jobs we have to do, but also monitor time and cost in service processes. Tasks are also linked to Contacts to provide personalized records.

Chapter 4 presents two rounded solutions that bring together techniques from the previous chapters and are where all the Outlook components integrate into an efficient machine that belies any belief that Outlook is simply an email client.

For More Information: http://www.packtpub.com/outlook/book

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