

## 1 Profiling Contacts with the Outlook Forms Designer

Most of us know that Outlook has various folders like Contacts, Calendar, Tasks, etc. Opening an item in one of these folders brings up a form that enables us to fill in the relevant details about that item.

What not many people are aware of is the fact that one can customise these forms to contain additional information over and above the standard fields that Outlook provides.

This month we're going to start with the basics and look at how we can customise the Contacts form to contain additional data fields that one might need in order to profile certain types of contacts. For this example we're going to add information about the customers that are buying from us.

Let's start with the [The Task](#) at hand, then

Look at [The Steps](#) taken to achieve what we want.



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## 2 The Task

By way of example we are going to use a company that sells baby bassinets, car sets, strollers and other related products as our "case study". You can adapt this for the particular products and/or services that you deal with.

The task before us is to customise the standard Contacts form so that we can do the following 4 things:

1. record the total dollar (or other currency) value of purchases made by each contact.
2. categorise our contacts into different types, namely:
  - Customers,
  - Prospects,
  - Suppliers and
  - Others.

This is what is commonly referred to as a dropdown list.

3. add a multi-selection picklist to record one or more products that the customer has purchased from us (or that a prospect is interested in), namely:
  - Bassinet,
  - Car Seat,
  - Stroller

Now that we understand the task at hand, let's look at [The Steps](#) taken to achieve what we want.

### 3 The Steps

You can't create a new Outlook form from scratch. All Outlook forms are based upon one of the base Outlook forms, such as Message, Contact, Appointment, Task, Journal, and so forth. So in this case we're going to start with the standard Contact form.

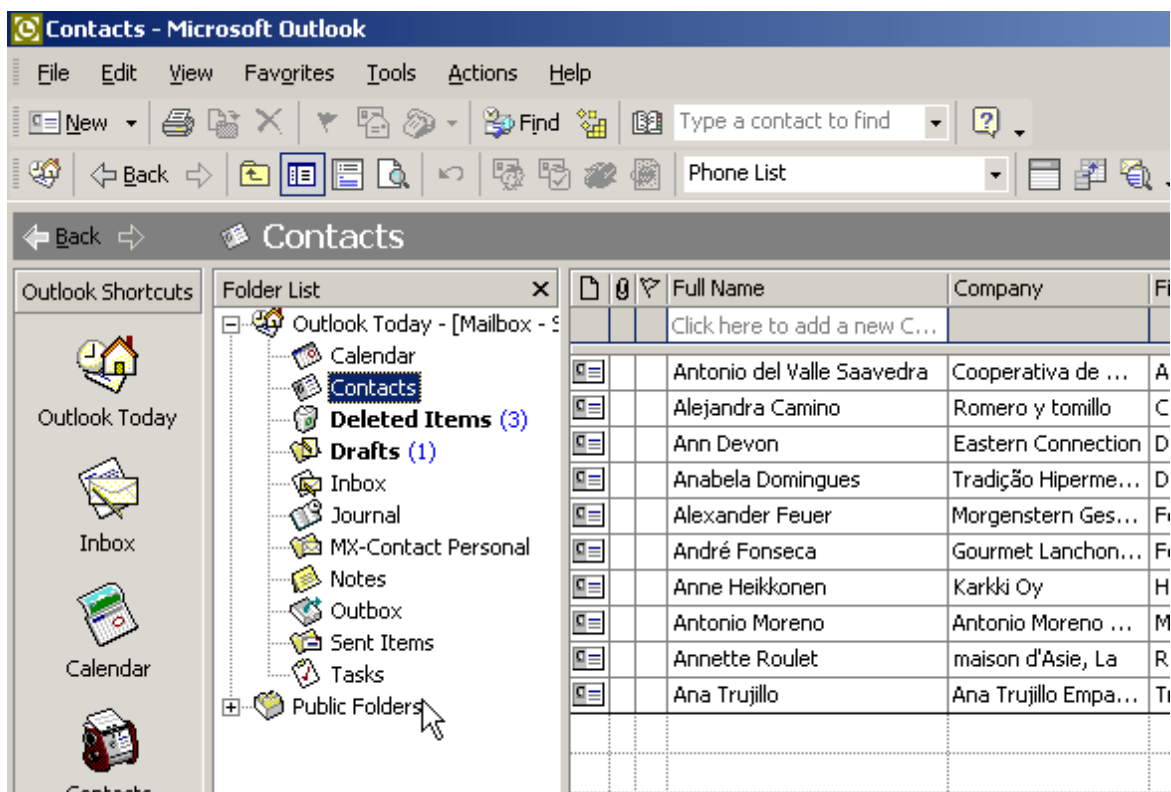
We will now follow the steps of:

1. [Opening the Form in Design Mode](#)
2. [Adding a Text Box](#)
3. [Adding a Combo Box](#)
4. [Adding a Multi-Selection Picklist](#)
5. [Renaming the Page](#)
6. [Publishing the Form](#)
7. [Saving a backup of the form](#)
8. [Setting this new form as the default form for the Folder](#)
9. [Entering the Data](#)

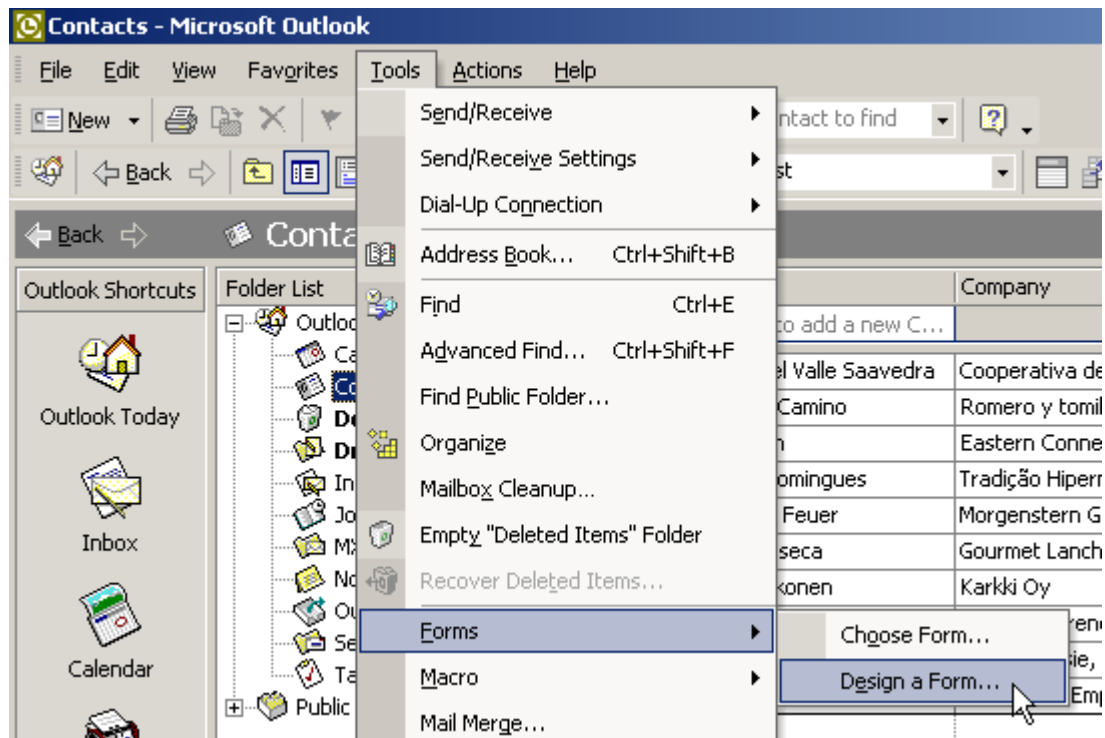
#### 3.1 Opening the Form in Design Mode

Follow the steps below:

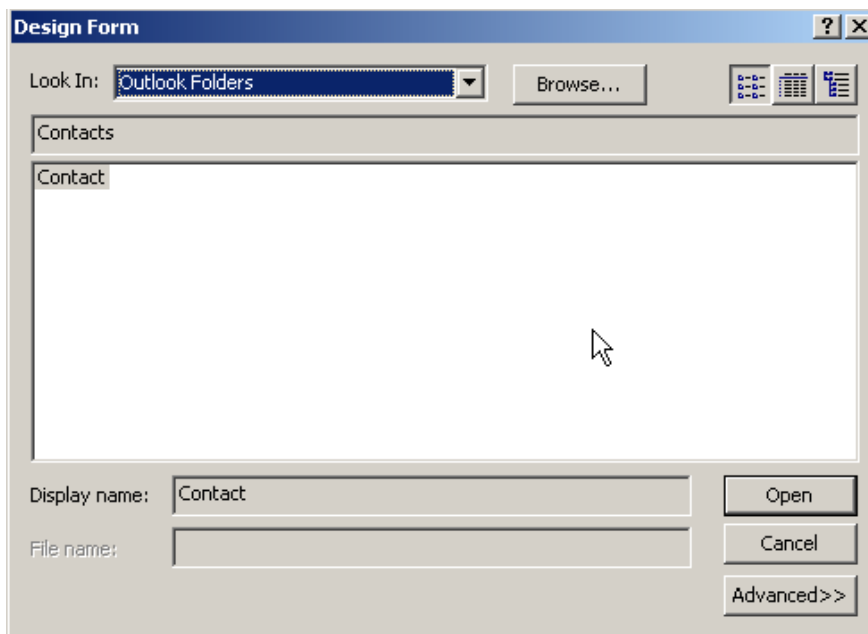
1. Open Outlook and select the **Contacts** folder.



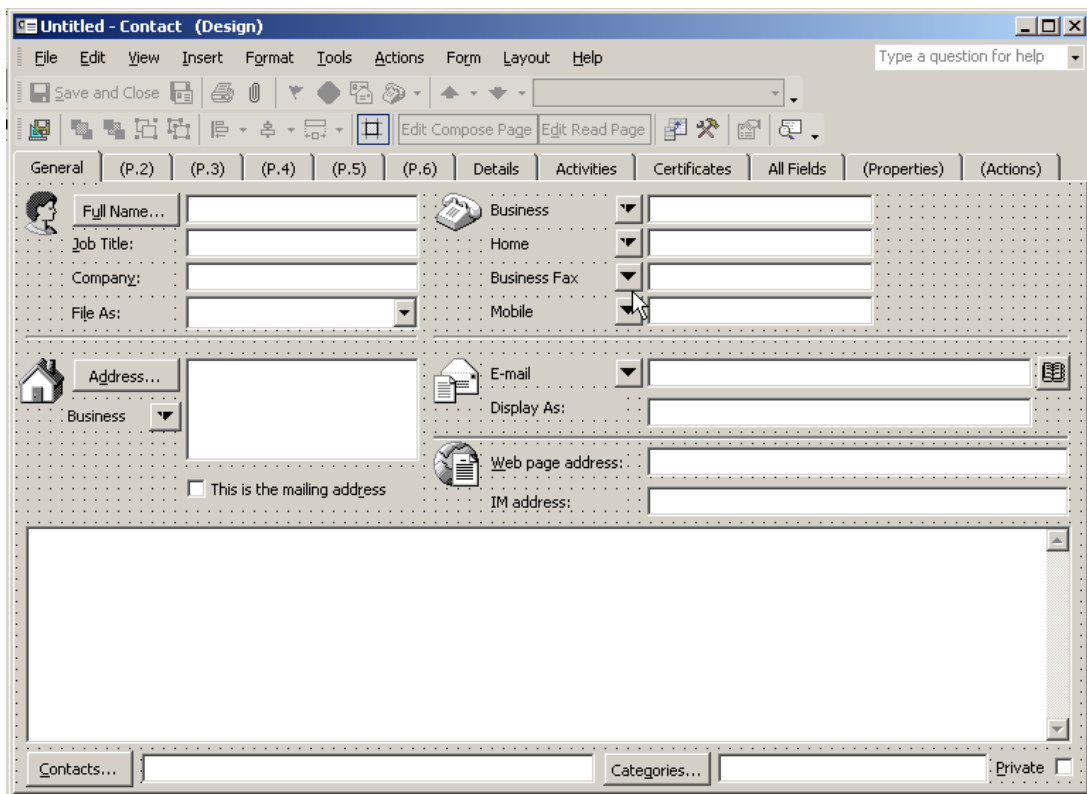
2. Select **Tools, Forms, Design a Form** from the Outlook Main Menu:



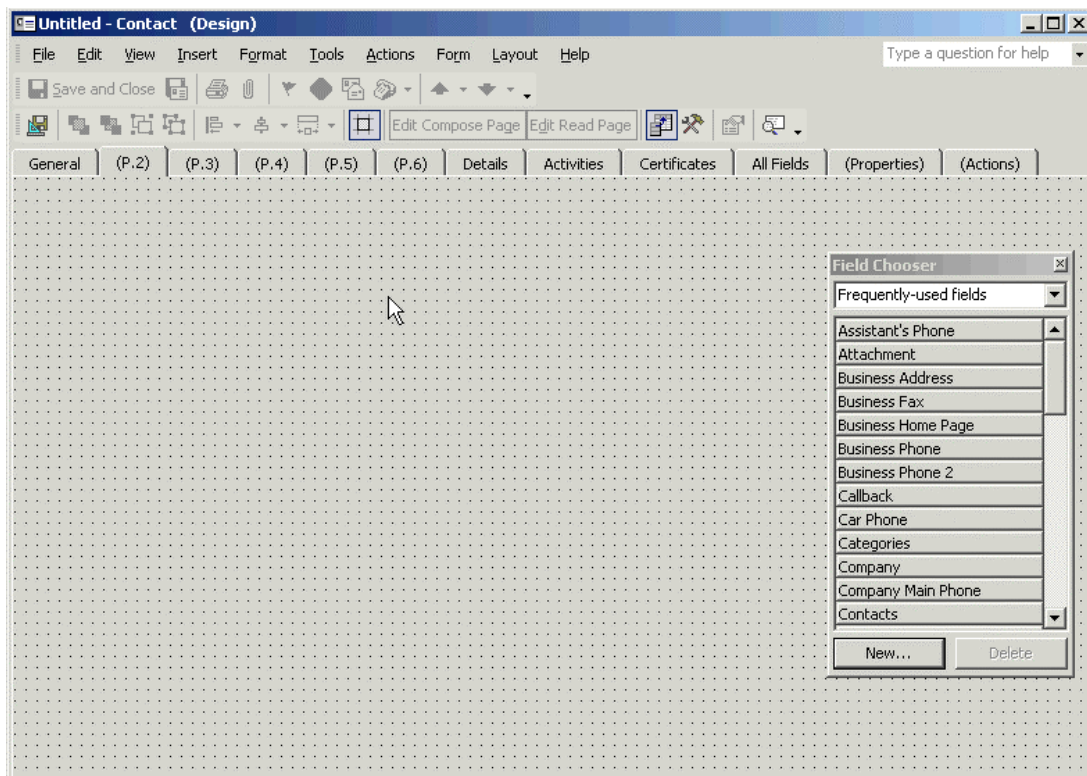
3. Select **Outlook Folders** from the **Look In** dropdown, select **Contact**, and then click **Open**:



4. You will then have the Contacts form open in Design Mode. This mode allows you to add new controls such as text boxes, combo boxes, labels, etc.

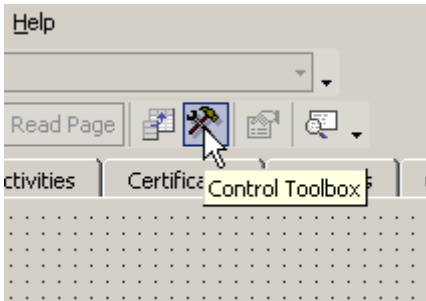


5. Select P.2 (Page 2). We're going to put the fields that we want onto a completely new page.

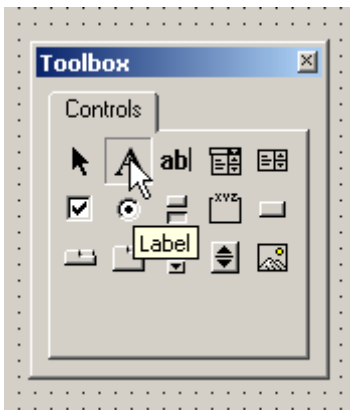


### 3.2 Adding a Text Box

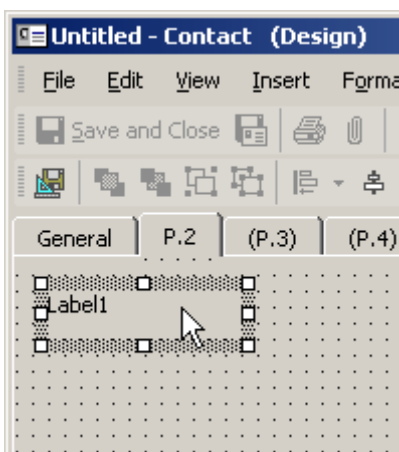
1. The first step is to add a field for the **Purchases Value**. This is what is known as a normal text box control. All controls are added via the Control Toolbox. Click the Control Toolbox icon:



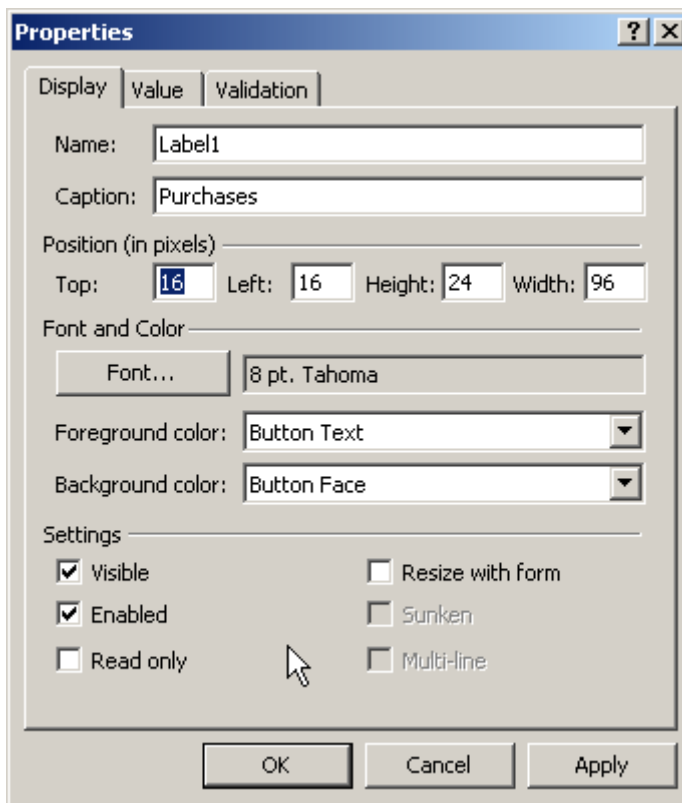
2. Then click on the label icon:



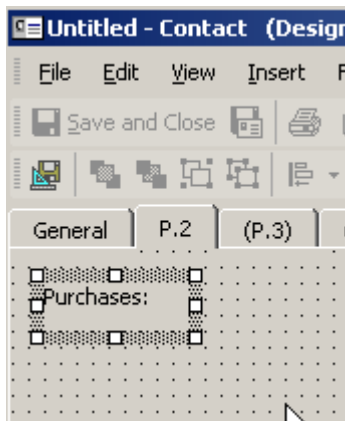
3. Drag a label onto the form: and then right click on the label and select Properties:



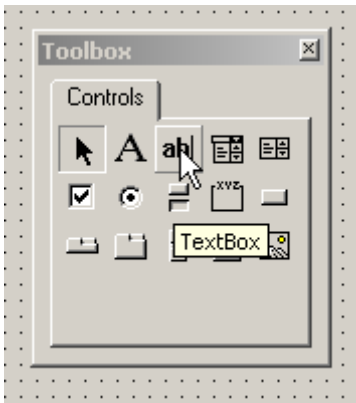
4. Then right click on the label and select **Properties**. Change the caption to **Purchases** (In a later topic we will cover recommendations on changing the Name but for the moment you can leave this as Label1):



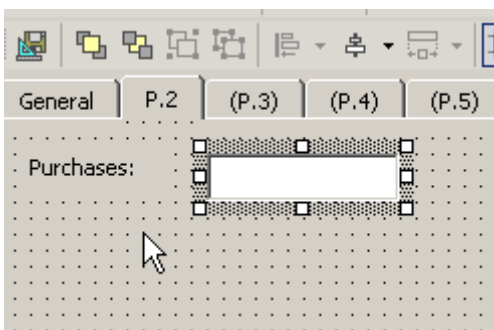
5. Then click on OK and you should now have the label **Purchases**:



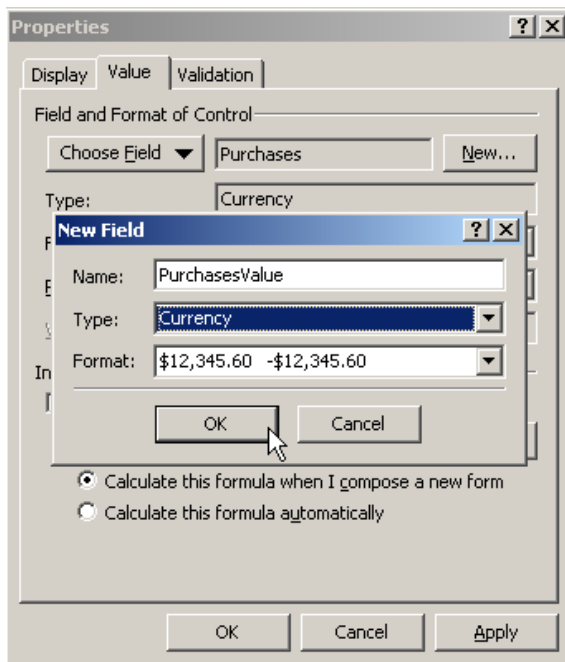
6. Now we want to add a text box for the actual value. So go back to the Control Toolbox and click on the text box icon:



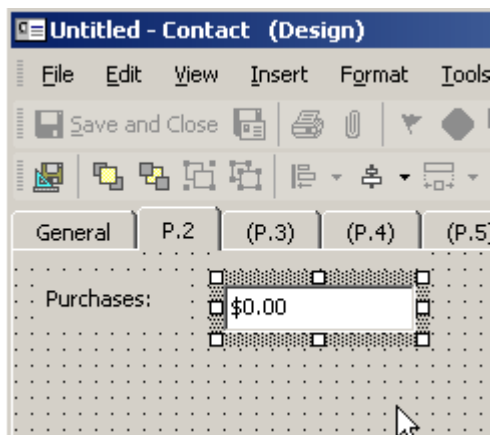
7. Drag and drop a Text Box onto the form, to the right of your label:



8. Then right click on the text box and select **Properties**. We now want to add a field called **PurchasesValue**. To do this you click on **New** and add a **Currency** field with this name.

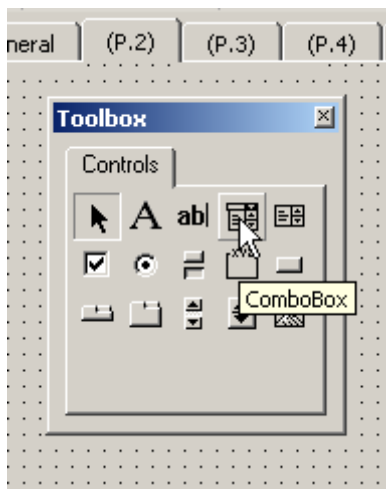


9. Then click on OK, and OK again, and you should now have the 2 controls next to each other.

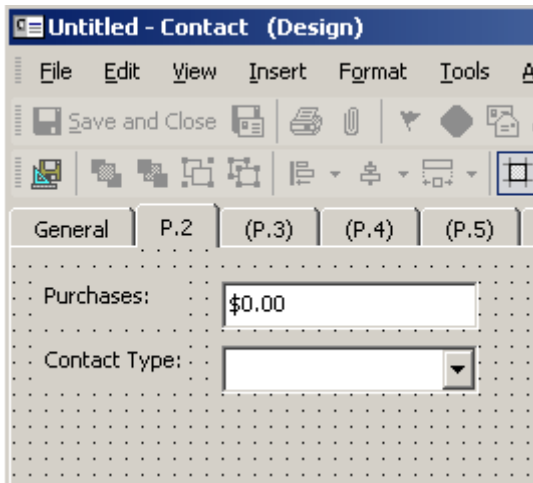


### 3.3 Adding a Combo Box

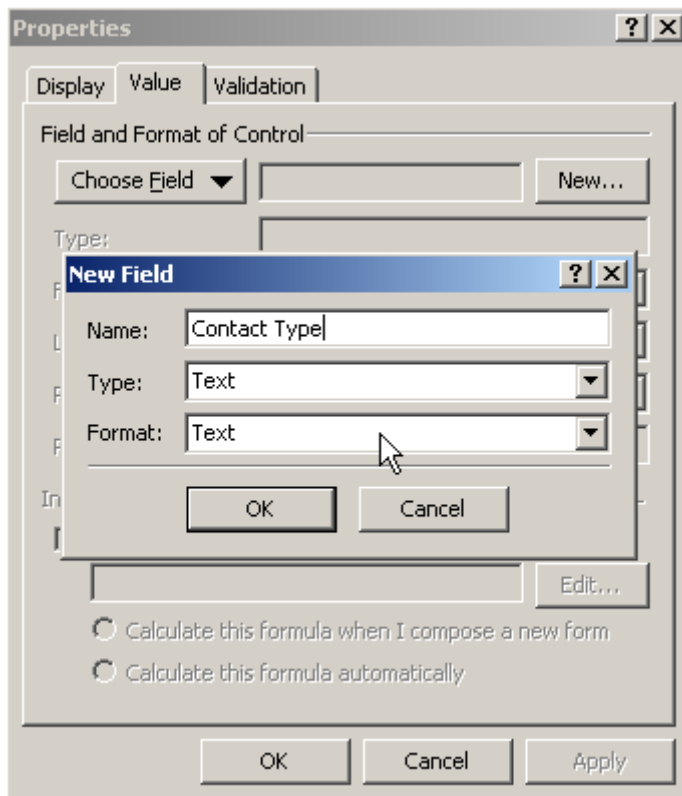
1. Now we are ready to add another field for the type of Contact. But first we need a label called **Contact Type**. See if you can add that following the same steps as for the Purchases label.
2. Now we need a dropdown list for types of Contact we deal with. For this we need what is known as a combo box. So look for this icon on the Control Toolbox:



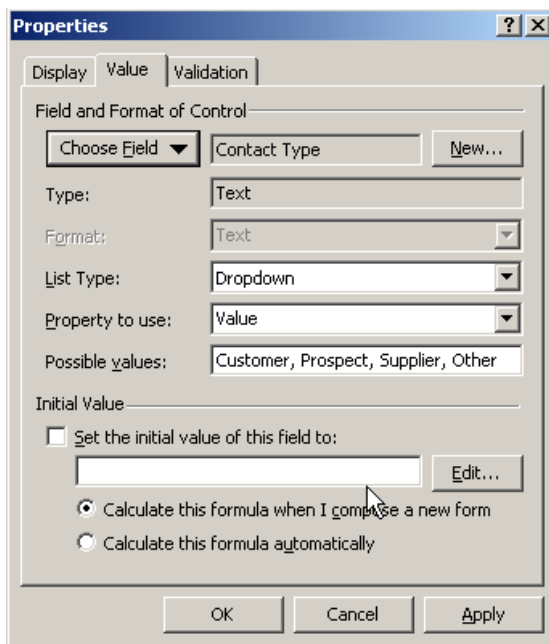
3. Add a combo box to the form by dragging it onto the page, underneath the **Purchases** text box:



4. Right click on the combo box and select **Properties**. Create a new field called **Contact Type**:



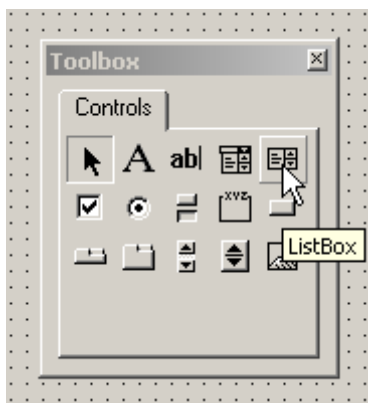
5. Enter the values for your selection list into the **Possible Values** field, separated by commas:



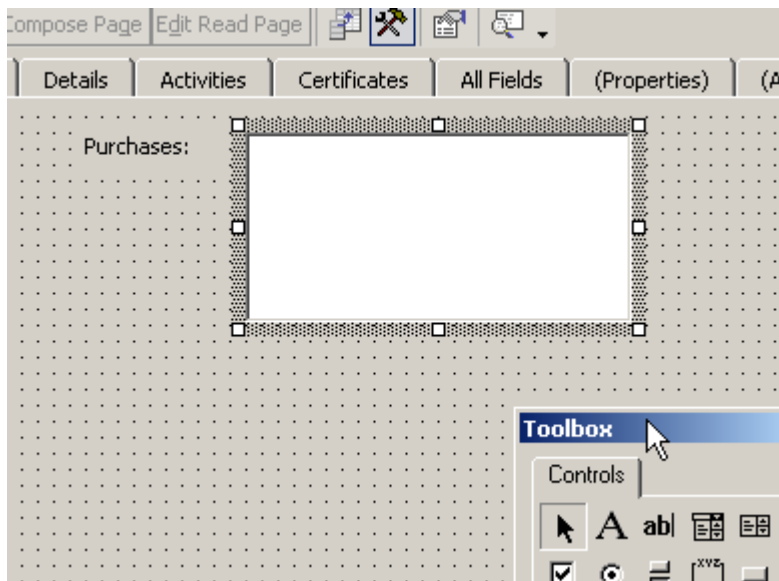
6. Click **OK**.

### 3.4 Adding a Multi-Selection Picklist

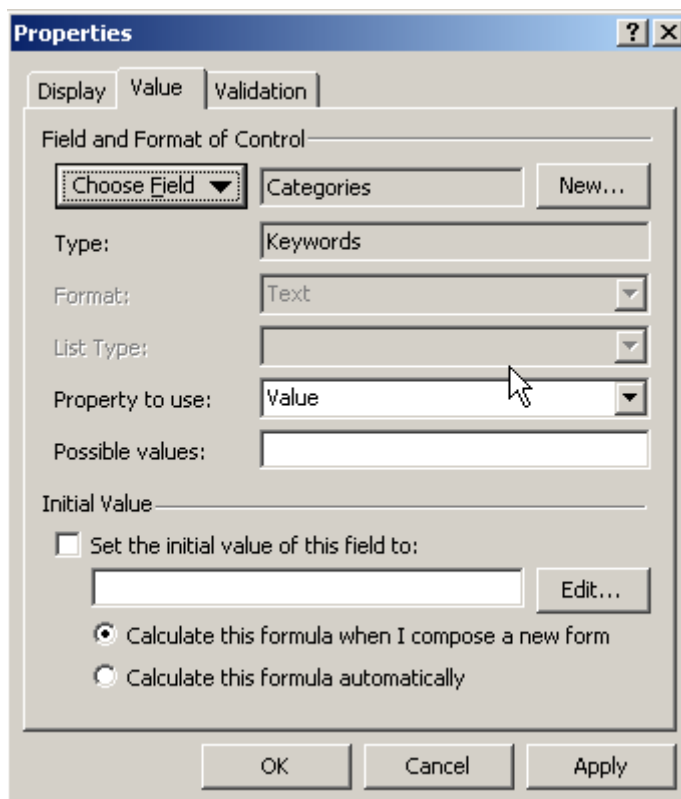
1. We are now ready to add a control for the products that a customer has purchased or is interested in purchasing. For this we need what is called a Multi-Selection Picklist, which allows you to select more than one item in that list.
2. But first we need a label. Add one with a caption **Products**.
3. Now we need the List Box control. Select this from the Control Toolbox:



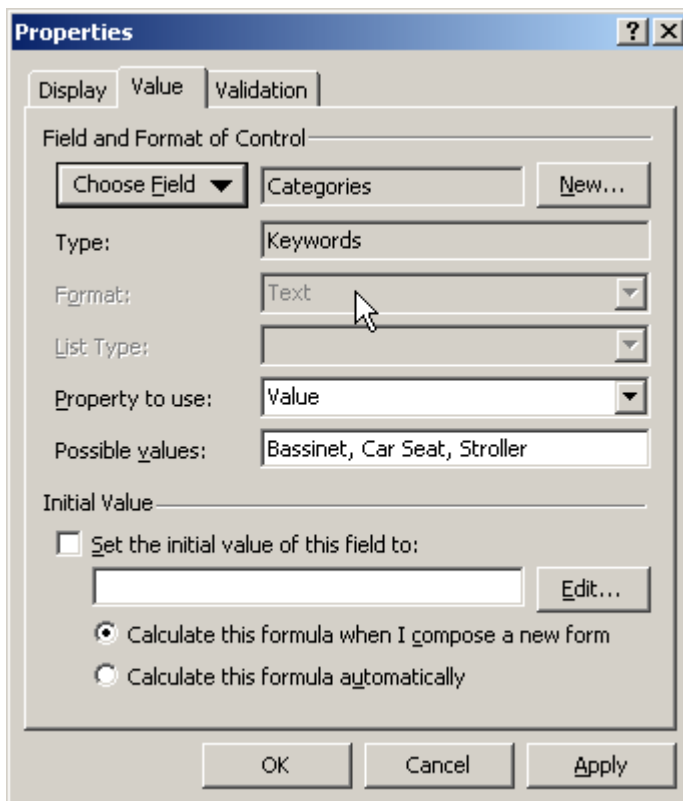
4. Drag a List Box onto the form, and then widen it a bit, as well as increasing the height by stretching the bottom of the box downwards:



- Right click on the List Box and select **Properties**. Instead of creating a new field we are going to use an existing field called **Categories**. You select this field by clicking on **Choose Field**, selecting **Frequently-used Fields**, and then choosing the **Categories** field. This is a special type of field called a **Keywords** field. It allows one to store multiple values in the field, separated by commas. These values can be grouped in a View so that one can see the contact appearing for each keyword that is displayed in the list.



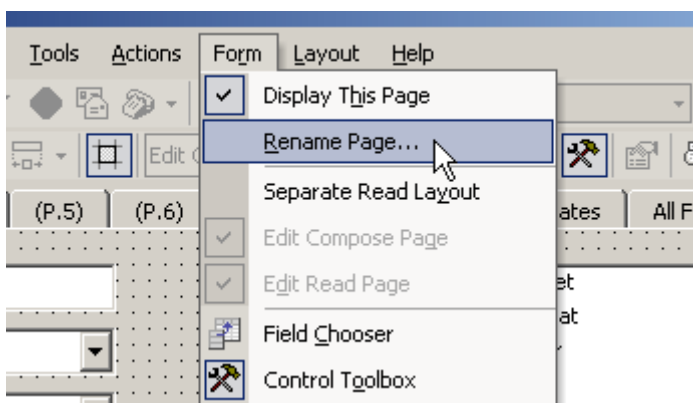
- Under **Possible values**, enter the list of products that are applicable, separated by commas:



7. Click on **OK** to complete the exercise of adding the List Box.

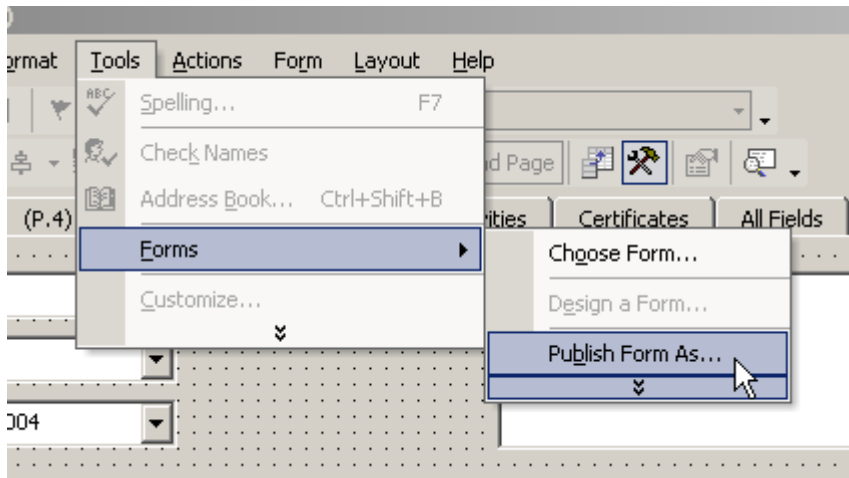
### 3.5 Renaming the Page

1. The last step is to rename the page from **P2** to **Profile**.

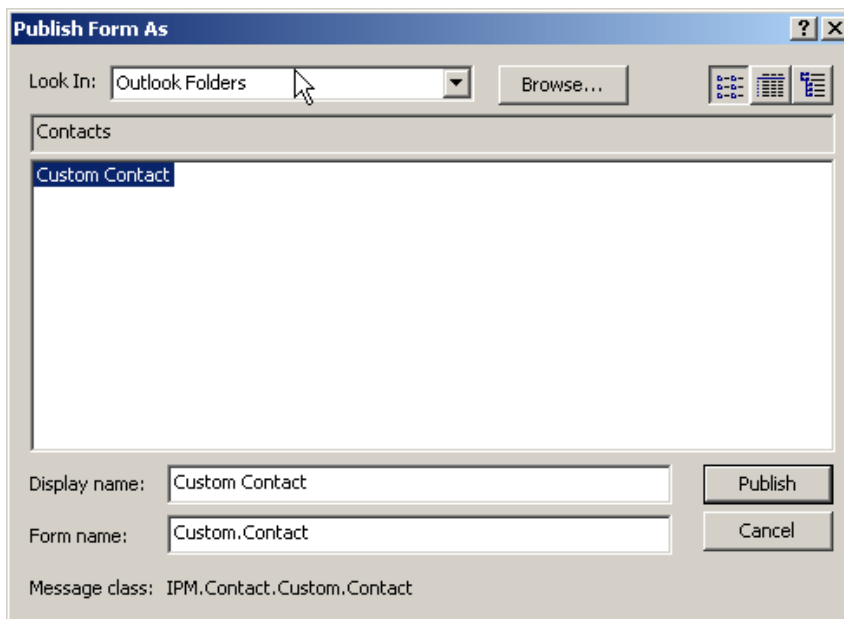


### 3.6 Publishing the Form

1. When you're ready to publish your form, choose **Tools, Forms, Publish Form As:**



2. Select where you want to publish the form, give it a name, and click **Publish:**

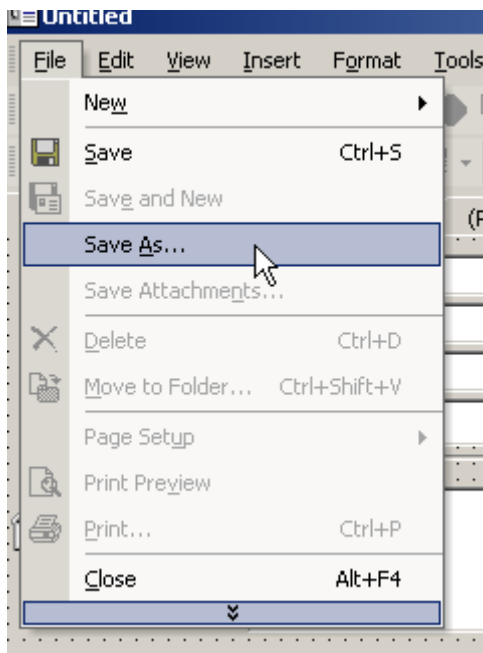


### 3.7 Saving a backup of the form

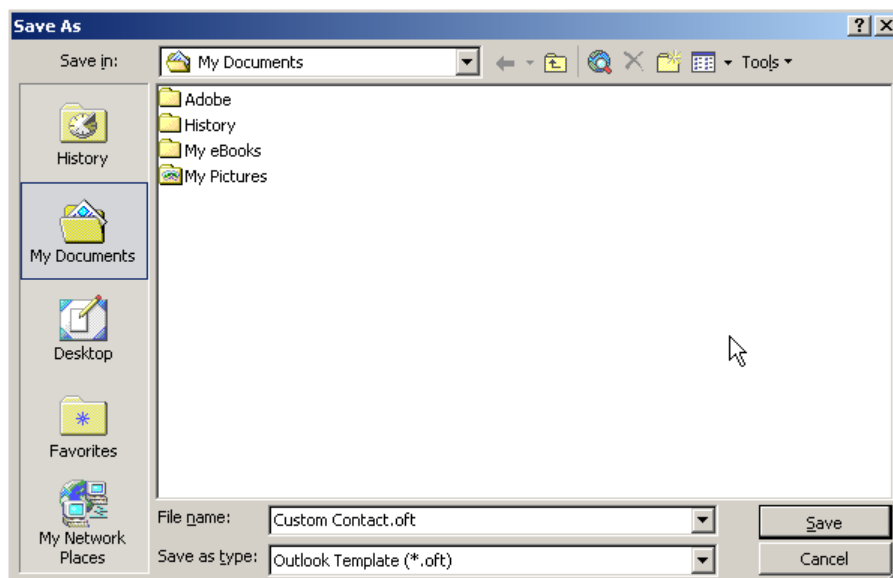
It's always a good idea to keep a backup copy of your form on your hard disk somewhere. That way you can always republish your form if anything happens inside Outlook.

To do this:

1. Select where you want to publish the form, give it a name, and click **Publish:**



2. Save this form as **Custom Contact.oft** under **My Documents**.

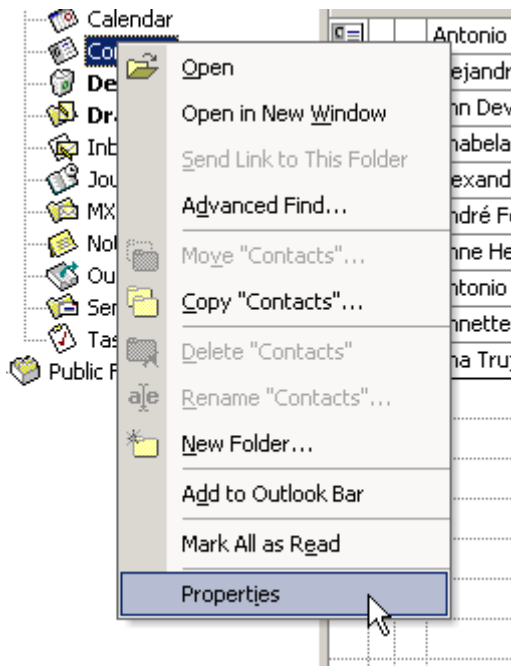


3. Close the Contact form but click **No** when prompted to **Save Changes**.

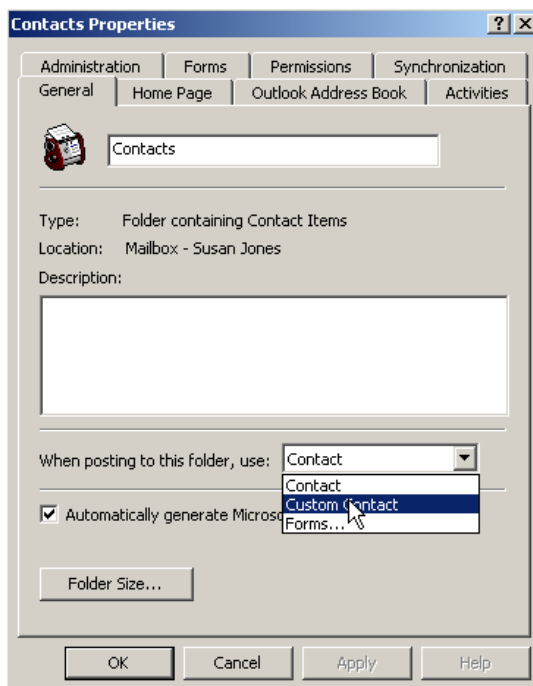
### 3.8 Setting this new form as the default form for the Folder

Now that you've published your form, you still need to set this form as the default form for the Contacts folder, so that whenever you add a new contact this form will be used by the system.

1. Right click on the **Contacts** folder and select Properties.



2. In the **When posting to this folder use field**, select **Custom Contact**.

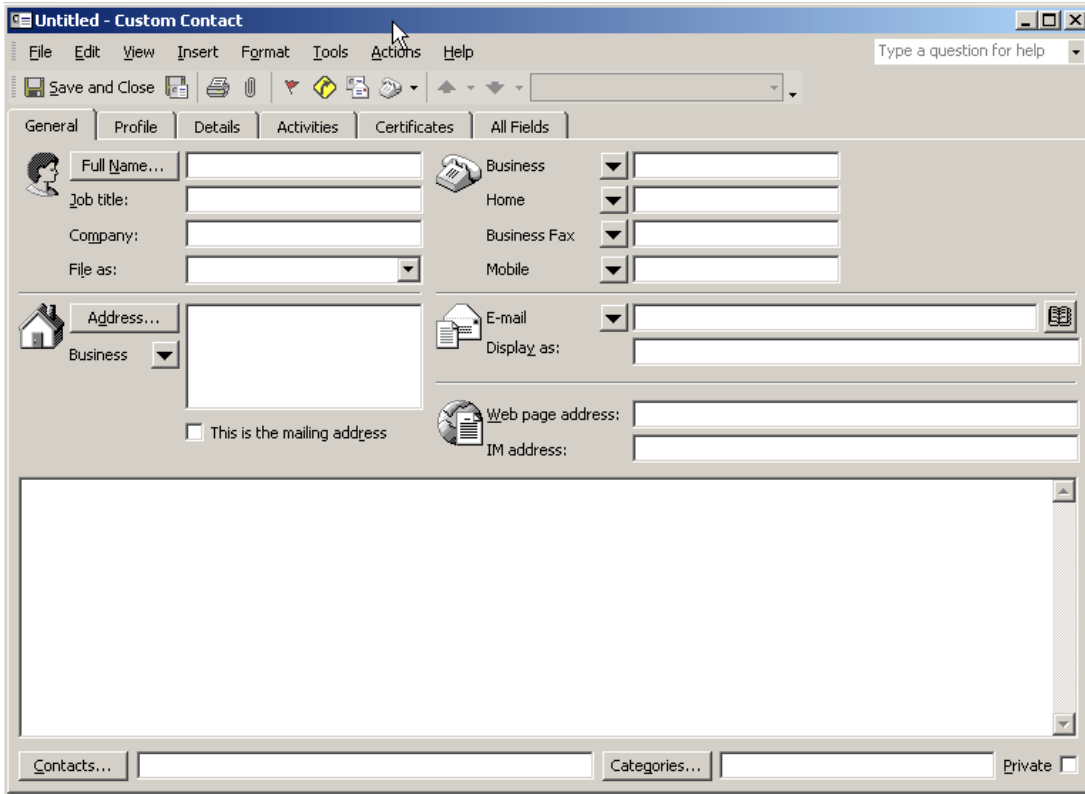


3. Open a new item and check that your custom form is displayed:

### 3.9 Entering the Data

Now that you've got your Custom Form, do the following:

1. Select the Contacts folder and click on the **New (Contact)** icon in the Standard Toolbar. You should see the following form (Notice the Profile Tab):

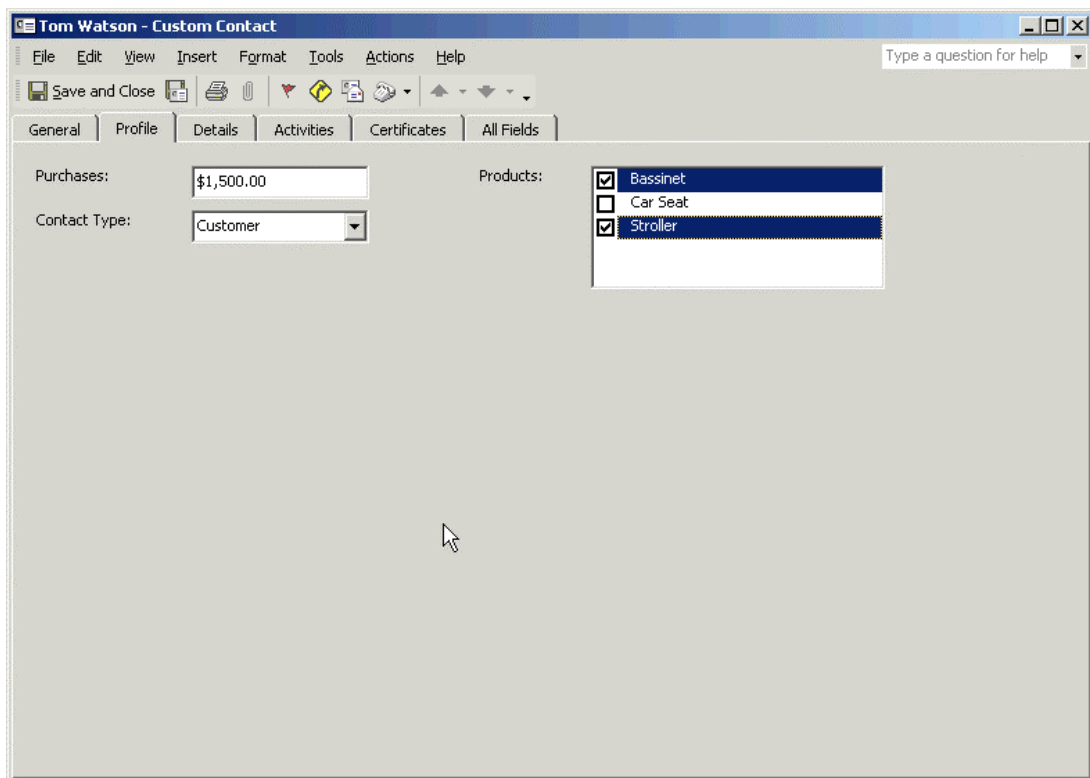


The screenshot shows the Outlook 'Untitled - Custom Contact' form with the 'Profile' tab selected. The form is divided into several sections:

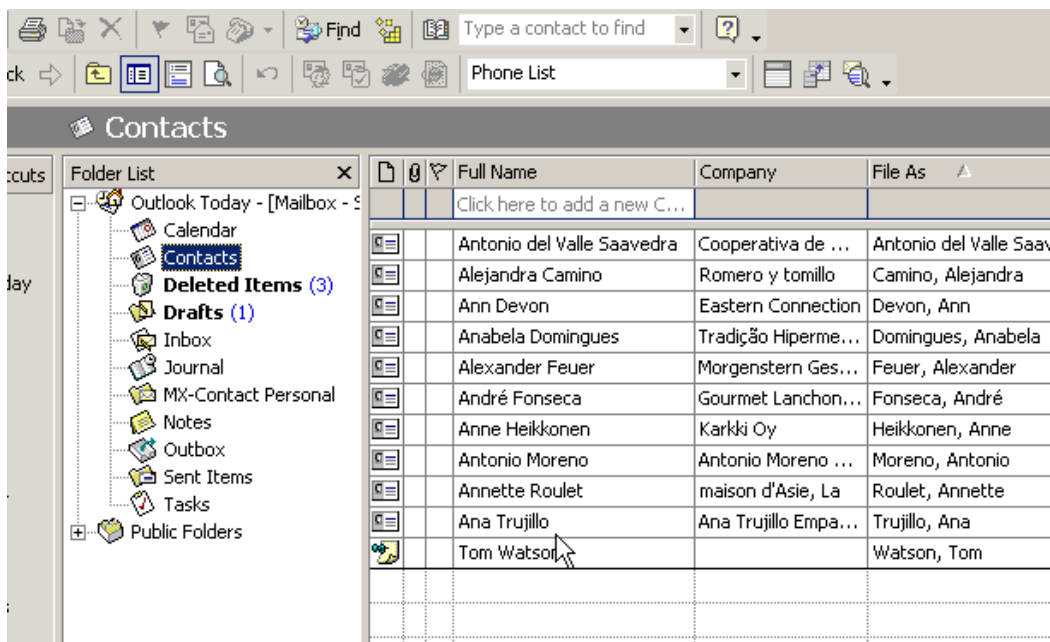
- General:** Full Name..., Job title:, Company:, File as: (dropdown).
- Address:** Address... (text area), Business (dropdown),  This is the mailing address.
- Business:** Business (dropdown), Home (dropdown), Business Fax (dropdown), Mobile (dropdown).
- E-mail:** E-mail (dropdown), Display as: (text area).
- Web page address:** Web page address: (text area), IM address: (text area).

At the bottom of the form, there are buttons for 'Contacts...', 'Categories...', and a 'Private' checkbox.

2. Enter **Tom Watson** under **Full Name**. Then click on **Profile**. You should be able to fill in the value of his total purchases, select from the **Contact Type** dropdown, and check/tick the various products that he has purchased:



3. Click on **Save and Close**. Note that the new contact appears with a Post icon instead of the normal contact icon, which indicates that a custom form has been used for this contact.



4. Open the form again and check that all your data has saved correctly.

### 3.10 Understanding Message Classes

This is a tricky issue. One would expect the existing contacts you have in your Contacts folder to open with the new form. The reason they do not is because the existing contacts have a Message Class of **IPM.Contact**. The new form you created has a Message class of **IPM.Contact.Custom.Contact**. Unfortunately there is no standard way of doing this in Outlook. In a later article in this series we will look at a utility that will enable you to do this.

## 4 Next Month

Next month we'll look at creating views to enable you to query your data, for the purposes of saying sending a direct mailing or e-mail to selected contacts in your list. We'll also be covering importing data from other sources like Excel.

## 5 About OutlookWise and ExchangeWise

[OutlookWise](#) is both a web site and newsletter aimed at keeping Microsoft® Outlook® users up-to-date with news, information and articles of interest on Outlook and Exchange Server, as well as reviews of add-on products and utilities, all geared to enhancing your knowledge of Outlook and increasing your productivity.

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If you would like to contribute an idea or article, or tell us about an exciting product or utility that complements Outlook and/or Exchange Server, please feel free to [e-mail](#) us.

OutlookWise is a service to the Outlook community from [ExchangeWise](#), which is a specialist software company focusing on the development and marketing of applications and utilities that enhance the functionality of Microsoft Outlook and Exchange Server.

OutlookWise is edited by [Brian Drury](#), founder of ExchangeWise, and the architect of [MX-Contact](#), a CRM, Contact Management and Sales Automation System for Microsoft Outlook. Brian has over 20 years experience in the IT industry and has focused on CRM, Messaging and Collaboration systems for the last 14 years.