

1 Updating Category Assignments of Multiple Items at One Time

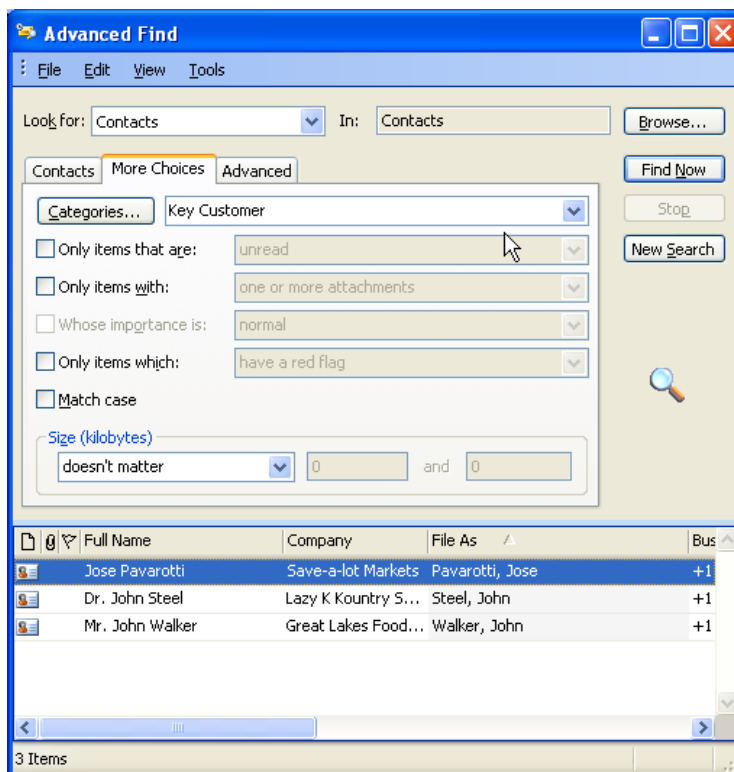
There are times when you want to change the category assignments of several items at one time.

For example, assume that you've replaced a misspelled category name (in the **Master Category** list) with the correct spelling.

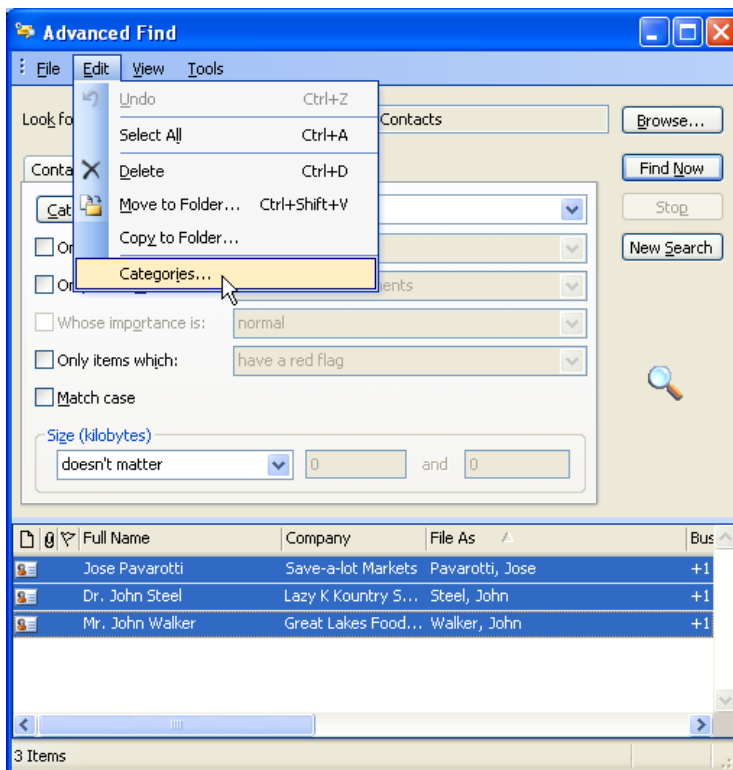
After you change the category list, any items to which you had assigned the old category will still have the incorrect spelling. So naturally you'd want to replace the old category with the new correct one.

For example, assume you want to change all contacts with Category "**Key Customer**" to "**Key Client**". To do so, follow these steps:

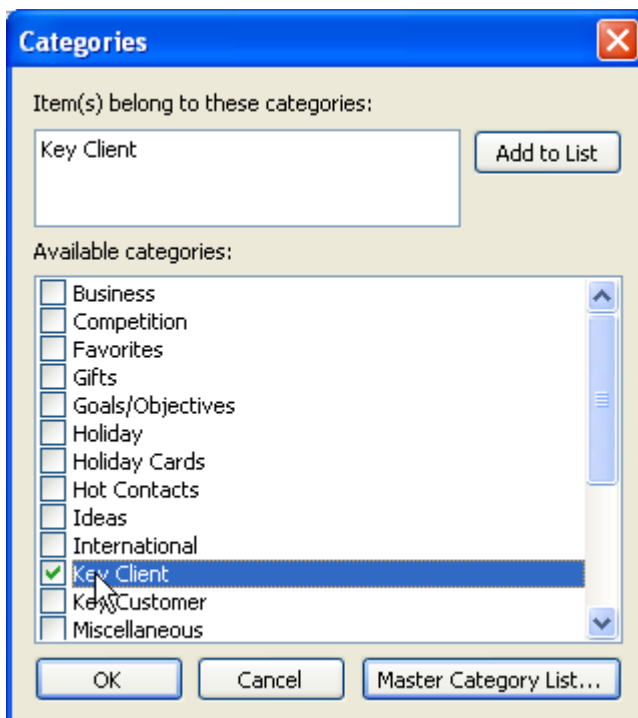
1. In Outlook, choose **Tools->Advanced Find**.
2. In the **Look For** drop-down list, select the type of Outlook item for which you want to search.
3. In the **Advanced Find** dialog box, click the **More Choices** tab.
4. Type the old category name in the box beside the **Categories** button, and click **Find Now**:



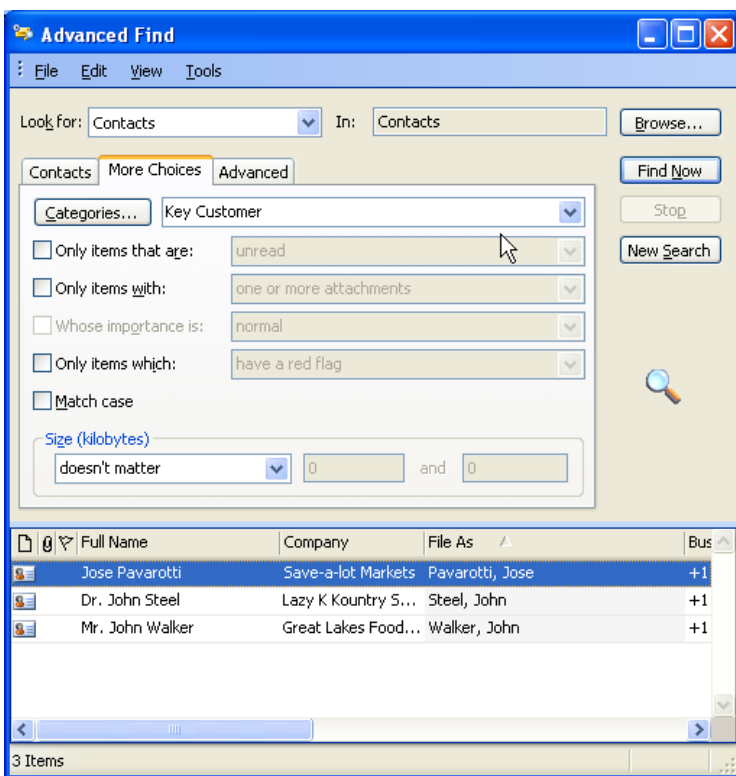
5. In the search results area, select all the items for which you want to change categories.
6. Use **Shift+Click** or **Ctrl+Click** to select them. Then click **Edit->Categories**:



7. In the **Item(s) Belong To These Categories** list, highlight the portion of the category you want to change, retype it, and click **OK**.



8. Outlook reassigns the categories accordingly:

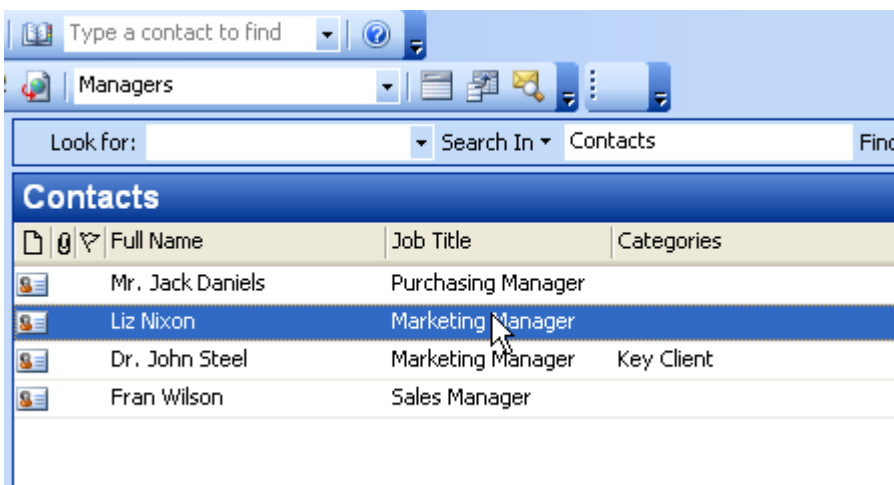


Note: If an item is assigned multiple categories, Outlook doesn't make changes to any categories that don't appear in the **Item(s) Belong To These Categories** list. So you can change a single category without changing others.

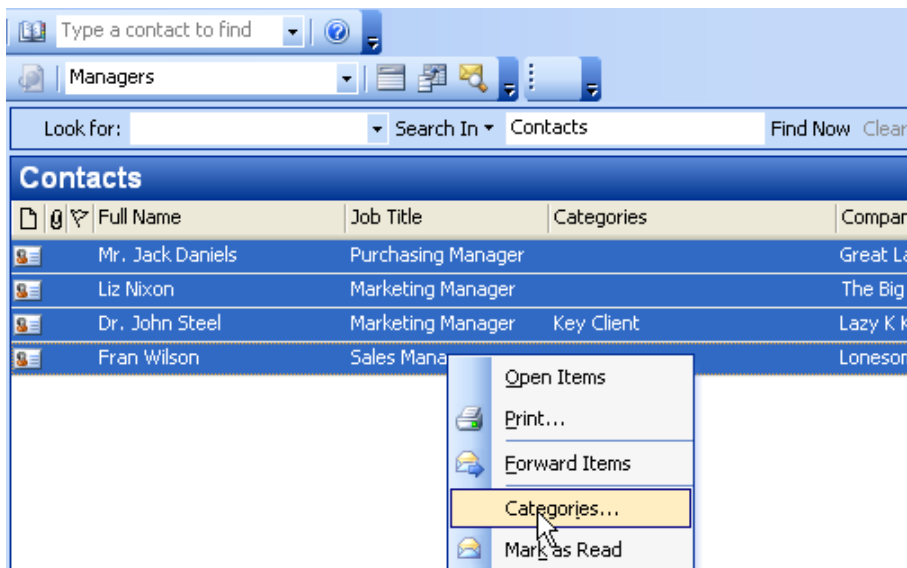
2 Updating the Category from a View

Assume you have created a view displaying all the contacts that meet a certain criteria. You now want to update the Category field to a certain value for each item that appears in the view. (A possible reason is that another application only uses Categories to filter items). So what you would do is as follows:

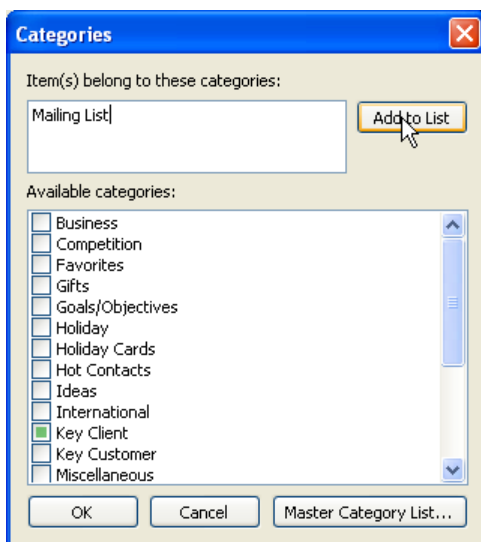
1. Select the View, e.g. in this case Managers:



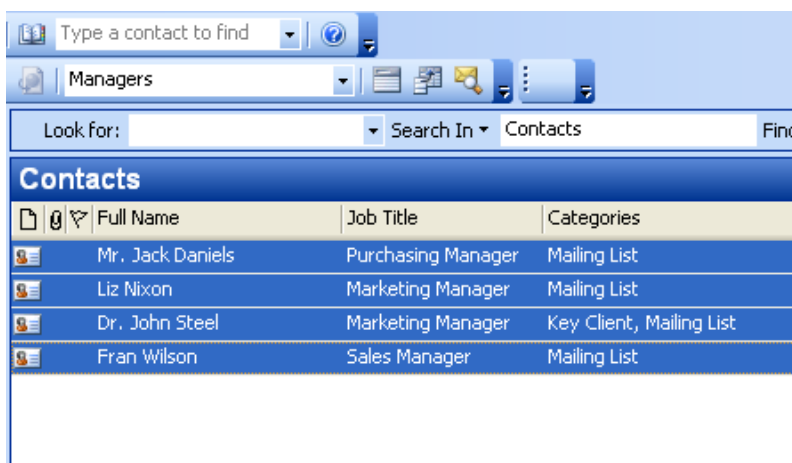
2. Select all the items in the view and right click, and select **Categories**:



3. Set the **Category** to a value that you can then use to filter these items for the other application. In this example we're setting the value to Mailing List because we want to be able to identify all contacts that have a category "**Mailing List**" for our mail merge program. Click OK.



4. The Categories are updated accordingly:



3 MX-Contact: Managing Contact Lists inside Outlook/Exchange

If you're looking for an application to assist you with managing a contact list of some kind, whether it be customers, prospects, members, suppliers or whatever, check out [MX-Contact](#). **MX-Contact** is a CRM, Contact Management and Sales Automation package that runs inside Microsoft Outlook 2000, 2002, 2003 or 2007. The system utilises all the standard functionality of Outlook but provides many additional features that transform Outlook into a powerful Contact Management and CRM system.



www.mxcontact.com

MX-Contact has 7 different versions available catering for a single user through to an enterprise with thousands of users, with data storage in an Outlook Data File, Exchange Server Public Folders, or Microsoft SQL Server.

MX-Contact comprises a **Base System**, with optional **Sales, Marketing and Support** modules that can be added at any time. So you can use MX-Contact for managing the contacts and/or companies you deal with, and the interactions (phone calls, e-mails, appointments, etc.) you have with them, plus use it to manage your sales opportunities, events and/or customer support incidents, by adding any of the available modules.

4 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.

If you've found this article helpful, please [subscribe to the monthly newsletter](#).

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.