

Email Business Card & Signature Installation & Use Instructions Outlook 2000 / 2002 / 2003

Note: Your installation may go more smoothly if you first print these instructions.

Note: Throughout these instructions you will find references to “business cards.” Your firm may have ordered our “signature style” branding instead. If that’s the case, please follow through these instructions as if you were installing a business card – both products are identical in terms of how they work – they just look different.

1. Click the link provided to you (either by email or on a webpage you have been directed to). This will open your new email business card template in a browser window.
 2. Using your mouse, place your cursor on the text that appears above the card that reads. “Enter your signature here...” then RIGHT CLICK and choose SELECT ALL. You’ll see the text and the graphic on the page become highlighted.
 3. Now RIGHT CLICK again (in the same place) and this time chose COPY.
 4. Now go to Outlook’s Inbox. Click TOOLS at the top and pull-down to OPTIONS.
 5. Click the MAIL FORMAT tab. Near the top, make sure you’re set up to compose messages in HTML format. **Make sure that the two checkboxes pertaining to the use of “Microsoft Office Word” are UNCHECKED.** Click the SIGNATURES button found near the bottom.
 6. In the “Create Signature” window click NEW.
 7. Type any descriptive name you want to use. Make sure that you have “Start with a blank signature” selected and then click NEXT.
 8. You’ll now be in the “Edit Signature” window. Place your cursor in the composing area (the white text box). RIGHT CLICK and choose PASTE.
 9. Your email business card template will appear. Use the scroll bar to move to the top of the card.
- Note: Do not be concerned with the black rectangles that appear around the links in your business card. These will not appear when messages you send are being read by the recipient. (Also note: links in your business card will not work during this set up process.)**
10. Highlight the “Enter your signature here...” text and then type in the closing block you would like to use above your email business card. You may use multiple lines, and adjust the font to your liking. Click FINISH when done.
 11. You’ll be returned to the “Create Signature” window. Click OK.

12. You'll be returned to the MAIL FORMAT tab. In the "signatures" section make sure that you have your new signature set for both new messages and for replies / forwards.

13. When done, click OK at the bottom of the MAIL FORMAT tab.

This concludes the set up process.

The rest of these instructions pertain to using your signature (business card).

14. When you click NEW MESSAGE your email business card should appear.

Please note that the embedded links in the business card will not function during the composing process, only when the email is being read.

Also note that the black rectangles that appear around the links will not appear when the message is being read. These show up only while you are in "compose mode."

15. When you go to reply to a message your business card will usually appear automatically for you to type above. However, if the message you are replying to was composed in "plain text" your business card will not appear.

16. In this case, you may want to manually insert your business card. To do this, you will first need to click FORMAT at the top of the message you are replying to and change the message format to HTML.

17. Once the message format has been converted to HTML click INSERT, then click SIGNATURE and slide-over to the name of the signature you used when setting up your email business card.

Your business card should now appear in your message.