



# Contacts Sort Order User's Manual

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## **Welcome**

Thank you for choosing Contacts Sort Order add-in, created by Sperry Software. When you would like to set a sort order on all new contacts, it's quite simple (and the directions are below, just in case).

However, if you want to sort your existing contacts, it's not so simple. Normally, you'd need to change the File As field on each contact one by one. This add-in automates that process by changing the File As field for you, based on your preferences, all at once.

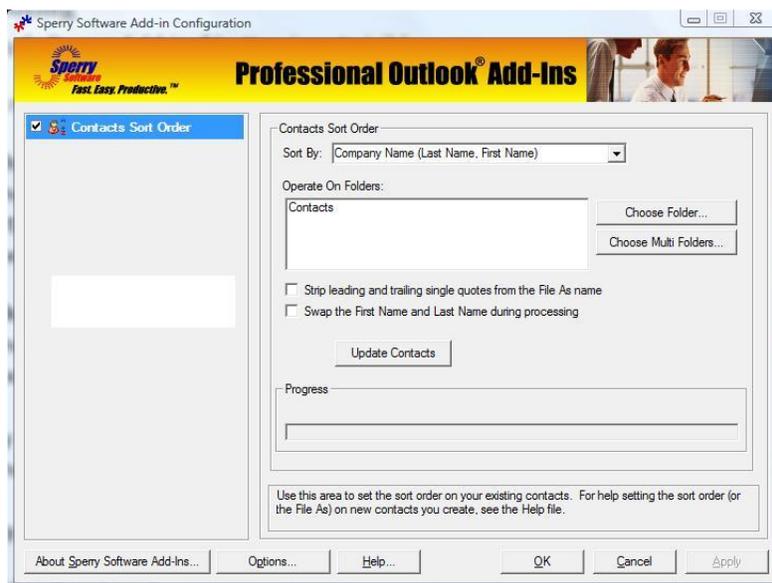
The first thing you will want to do is make a copy of your contacts folder. This serves as a backup in case you make a mistake in choosing your options. You might also want to backup your entire Outlook data file at this time, especially if you haven't done it in a while.

## Configuring the Add-in

Once the installation is complete, you are ready to use Contacts Sort Order. When you open Outlook you will notice a new button "Sperry Software Add-ins" added to the toolbar.



Clicking this button displays the Sperry Software Add-ins configuration screen. It is on this screen that settings are made to control the add-in's functionality.



## How to change the order of names in the address book

As you probably already know, the default for Outlook is First Name, Last Name order. However over time, the address book gets confused because of improperly formatted contacts. So, the Outlook Address Book sometimes displays first and last names in the wrong order. If you want to display "Last, First", but it persists in displaying names as "First Last" (or vice versa) then follow these steps. The steps are dependent on the version of Outlook that you are using and the mode. You can check the version (and if necessary the mode) by going to (in Outlook) Help...About.

### Outlook 2007:

Go to Tools...Account Settings...Address Books...Highlight the Outlook Address Book...Change...Set the sort order there

### Outlook 2003 and

### Outlook 2002:

Go to Tools...E-mail accounts...View or change existing directories or address books...Outlook Address Book... Change...Set the sort order there

## **Outlook 2000:**

*Corporate/Workgroup Mode:*

Go to Tools menu...Services...Highlight the Outlook Address Book service...Click Properties...Set order

*Internet Mail Only Mode:*

Go to Tools menu...Address Book...View menu...Sort by

There – now your new address book entries will be correct. Now you have to tell Outlook to do the same to your contacts, because your contacts and your address book are two different entities. You can have contacts be a part of your address book, but you can have address book entries that are not represented in your contacts.

### **How to change the order of names in your contacts folders**

Unlike changing the order of names in your address book, the steps to change the order of names in your contacts folders is the same for all versions of Outlook.

Go to Tools...Options...Preferences...Contact Options. Set the “Full Name” and the “File As” order there.

Good – now all your new contacts will have their File As field correct when the contact is saved and their address book entries will be correct as well. But what about all your existing contacts? For that, you need the add-in.

### **How it works**

Start by choosing how you want your contacts to appear (in the “Sort By” dropdown). You will want to make this the same as the format you chose in the above step, to keep things consistent.

You then choose an Outlook folder where the contacts are located. By default, your default Contacts folder is selected, since this is the one most people will be interested in. You can choose one folder or many contacts folders.

Then, you have two more options to decide before running it.

The first option is to decide whether leading and trailing single quotes should be stripped off the File As field, the contact’s First Name and the contact’s Last Name. These quotes can sometimes be put on there after an import from Outlook Express or some other email program, or sometimes by some third party tools. If you don’t seem to have a problem with quotes appearing in your contacts then keep the checkbox clear, otherwise go ahead and check it, the add-in will remove the leading and trailing quotes where it finds them (in the File As, First Name, and Last Name fields).

The second option you need to decide is whether or not you want to swap the first name of all your contacts with the last name of your contacts. Outlook sometimes gets confused as to which name is which, especially when importing or exporting vcards. The best way to accomplish this is to look through your contacts and find all the ones that are reversed and **move** them to their own subfolder, then operate on just those contacts. When you are through and they are exactly the way you like them, then **move** them back into their regular folder where they belong. Since most people do not have a problem with transposed first and last names, you can leave this checkbox blank, which is the default.

Now that you have all the steps complete, you must click the Apply button to save the settings. Then you can click the Update Contacts button to enact your changes.

The progress bar at the bottom will keep you informed as to how far the add-in has come and roughly how long it will take, as well as displaying the name of the folder it is operating on.

## Troubleshooting

Q. The “Sperry Software Add-ins” button is not visible.

A. The add-in may have become disabled.

**For Outlook 2002, 2003 users:**

On the Outlook Menu, click Help...About Microsoft Outlook

Click the “Disabled Items” button

If “Sperry Software” is listed, enable it and restart Outlook

**For Outlook 2007 users:**

On the Outlook Menu, click Help...Disabled Items

If “Sperry Software” is listed, enable it and restart Outlook

The Sperry Software toolbar may not be set to “Visible”

On the Outlook Menu, click View...Toolbars and make sure that Sperry Software is checked.

Q. The “Sperry Software Add-ins” button does not respond.

A. Run the add-in Reset tool.

The add-in reset tool can be downloaded from

<http://www.sperrysoftware.com/outlook/tools.asp>

Q. How can we contact you for more help?

A. For help on more in-depth issues, check out our [Knowledge Base](#).