



For Outlook Desktop App

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## Welcome to Office 365!

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Sterling Mutuals Inc. is transitioning to Office 365. This cloud solution will benefit the organization by providing improved messaging, calendaring and collaboration, and will allow easy access to e-mail and files anytime, anywhere, and from virtually any device. The purpose of this document is to get you setup, set some expectations, and familiarize yourself with Office 365.

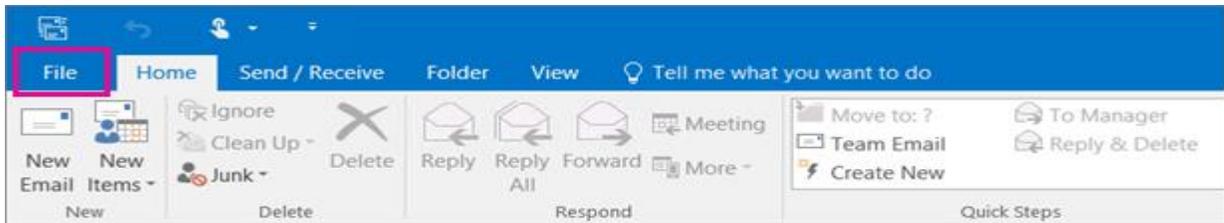
This guide will walk you through the basics on how to setup, and connect your Outlook desktop software, to read your email, and what to expect when setting up Outlook with your Office 365 account for the first time.

Enjoy Office 365, and let's get started!

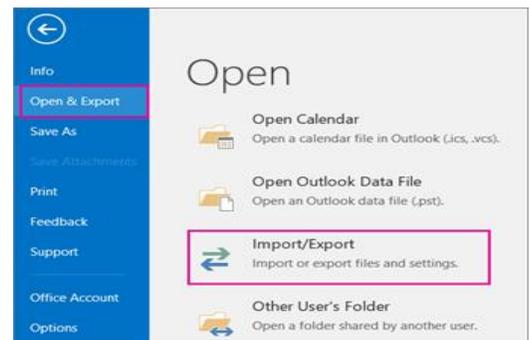
- **PLEASE PRINT AND READ THIS MANUAL BEFORE YOU START**

## Export contacts, and calendar, tasks, and notes items from Outlook to .pst file

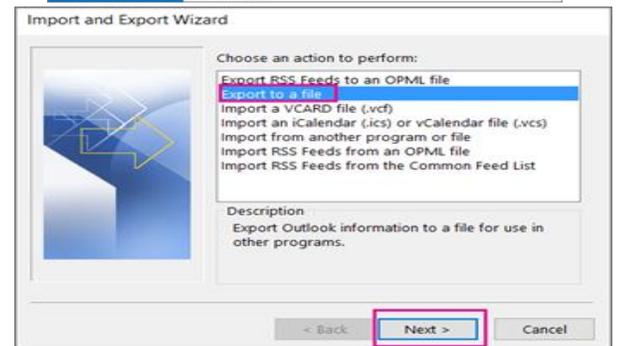
1. Open your Outlook for Desktop and at the top of your Outlook ribbon, choose **File**.



2. Choose **Open & Export > Import/Export**.

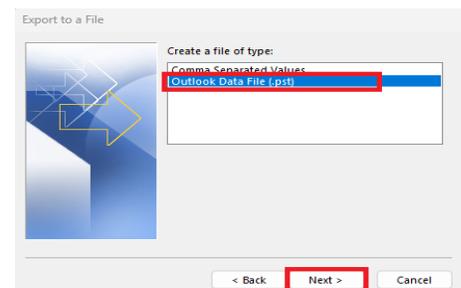


3. Choose **Export to a file**.



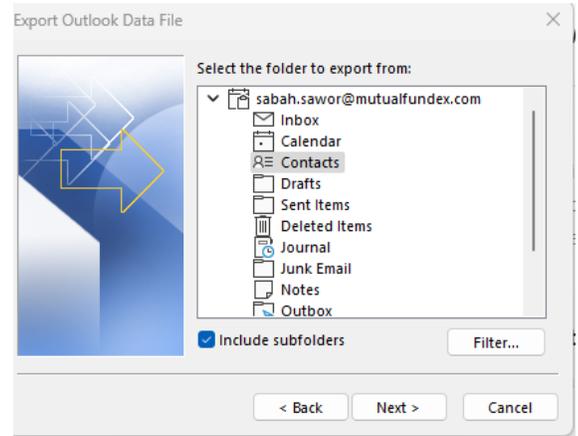
4. Click **Outlook Data File (.pst)> Next**.

5. Select **Outlook Data File (.pst)** and Click **Next**

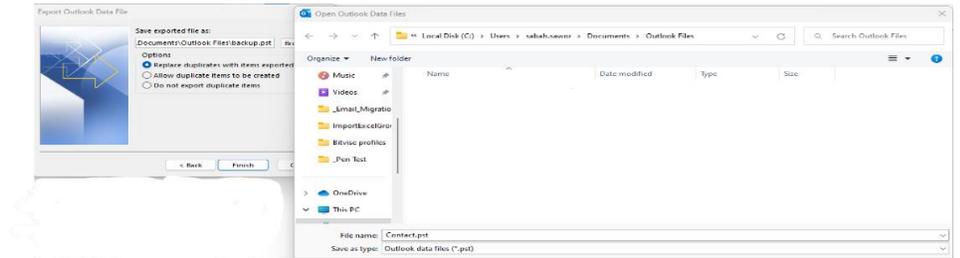


6. Select the **Contacts** from the list of folder export, as shown in the picture. Only information for one folder can be exported at a time.

Make sure that the Include subfolders check box is selected. Choose Next.



7. Select **Replace duplicates with items exported** then Click **Browse** to select where to save the Outlook Data File (.pst). Enter a file name and choose **OK** to continue. If you are prompted to enter a password, just leave it blank.

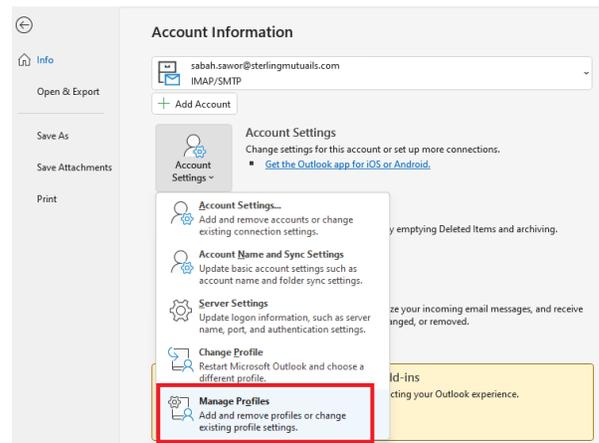


- **Do the same steps to export your Calendar, tasks and notes**

## How to create a new Outlook profile (Use this method if you have one email in your profile)

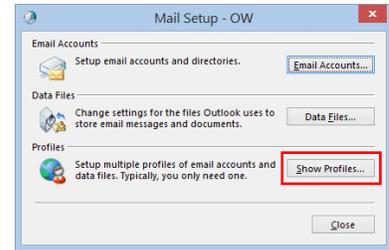
**We recommend not deleting the old profile until you have confirmed all your emails have been migrated to the new account.**

1. In Outlook (**File > Account Settings > Manage Profiles**). The Mail Setup dialogue will open. on **Show Profiles**.

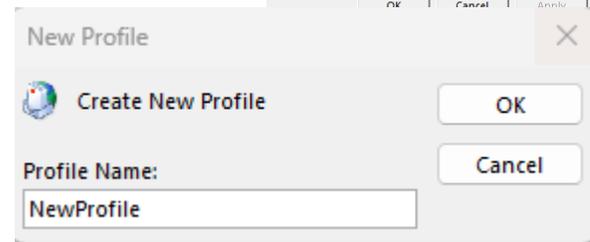
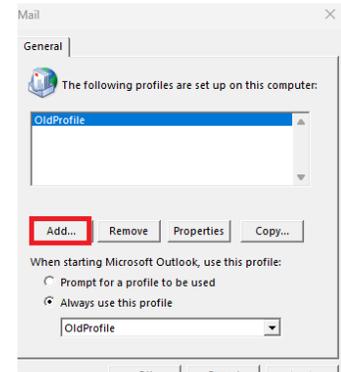


Click

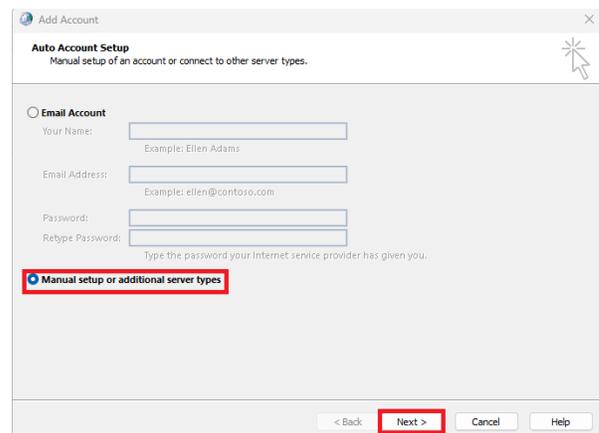
- The profile(s) currently set up will be listed. Click **Add** to add a new profile.



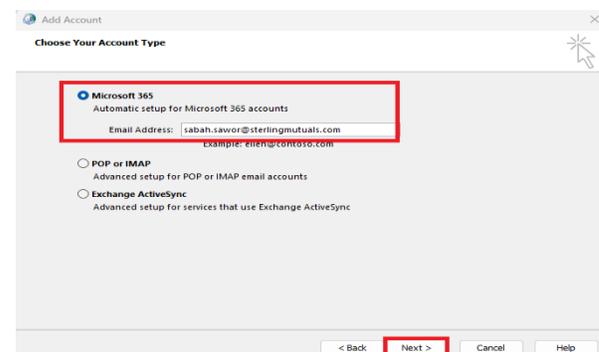
- Enter a name for your new profile.



- Select the **Manual setup or additional server types** then click **Next**

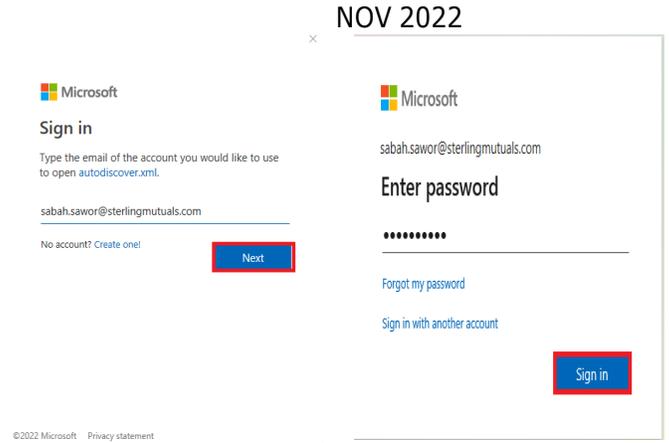


- Select **Microsoft 365** and type your email address then click **Next**



Office 365 User Guide for Sterling Mutuals Inc.

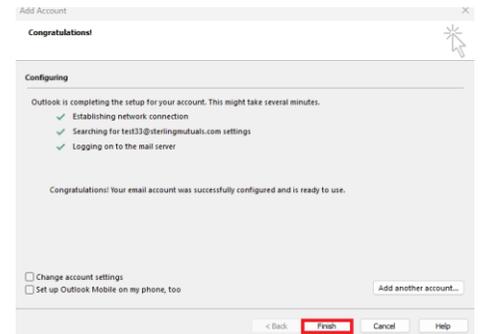
6. You will be prompted to Sign into your Microsoft office 365 account to continue.



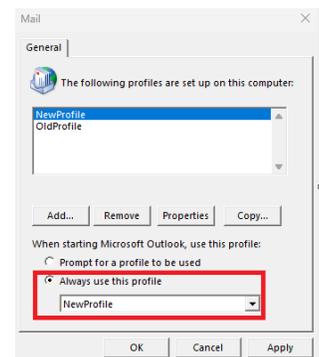
**Your Microsoft Account: [your-email]@sterlingmutuals.com**  
**Password: your Currently password in Icewarp system**

**\* If you do not know your password, please contact Sterling support to have your password reset**

7. Click **finish**, if everything looks good.



8. Make sure that the new profile has been selected from the list of **Always use this Profile** as shown.



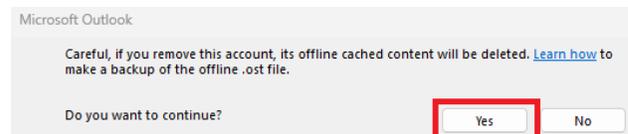
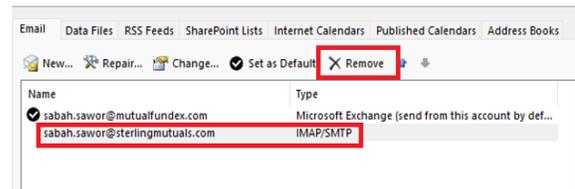
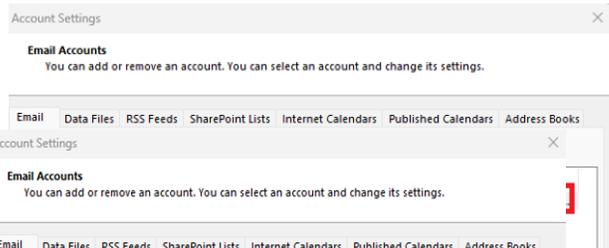
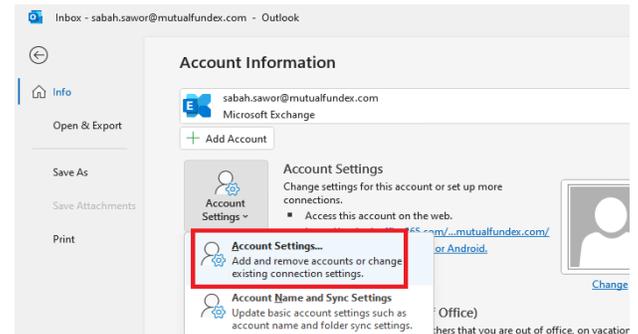
9. Restart your Outlook, your email Inbox will take some time to start showing



## How to setup your new 365 account to an existing Outlook profile (Use this method if you have more than one email in your profile)

### Remove your old email from your existing Profile

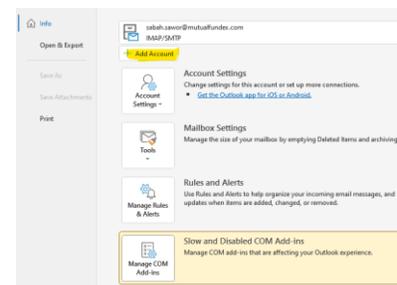
1. In Outlook (**File > Account Settings > Account Settings**).
2. Set the second Email account (not **@sterlingmutuals** email) as a default email
3. Select your old **@sterlingmutuals** email and click **Remove**.
4. You will prompt to confirm removing your old email, press **yes** to continue.



### Add your new email to your existing Profile

When opening Outlook on your desktop you need to add your new account on office 365, please follow the steps below to add a new account:

1. From the file menu click on add account

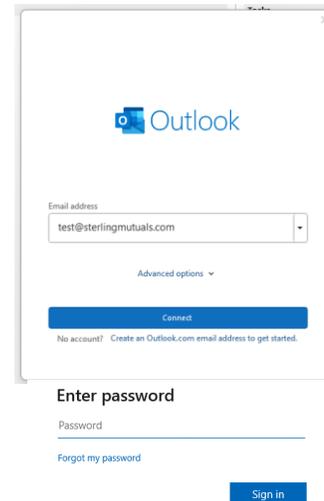


2. Enter your username for Office 365. Your username will be similar to your email address, in the form of

[<YOUREMAIL@sterlingmutuals.com>](mailto:<YOUREMAIL@sterlingmutuals.com>).

Then click connect.

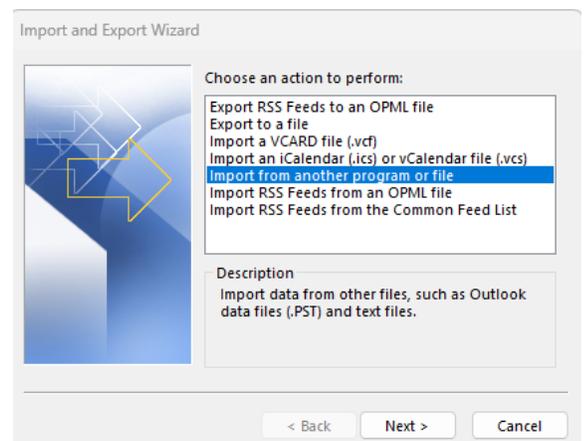
3. You will prompt to enter your password is the same as the one used to login to the webmail.sterlingmutuals.com network, if you are part of the domain you have to use your computer login instead.



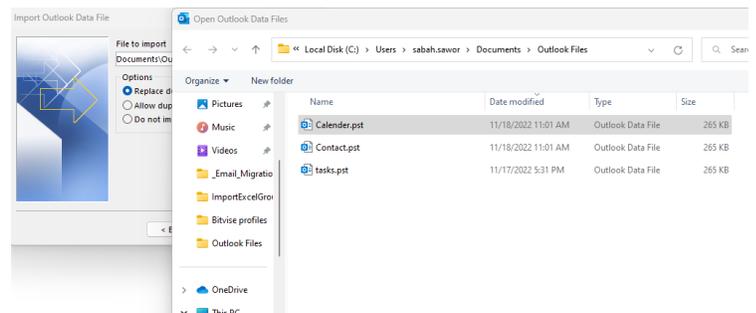
\* **If you do not know your password, please contact Sterling support to have your password reset**

## Import Calendar, Contact, and Tasks and Notes to Outlook for Desktop

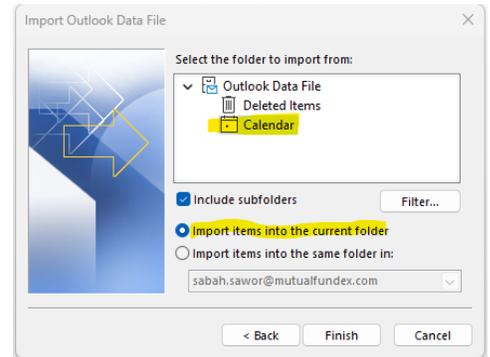
1. At the top of your Outlook ribbon, choose File. If your ribbon doesn't have a File option in the top left corner, see What version of Outlook do I have? to determine your version of Outlook and find the appropriate export instructions
2. Choose **Open & Export > Import/Export**.
3. Choose **Import from another program or file**.
4. Click **Outlook Data File (.pst)> Next**.
5. Choose **Outlook Data File (.pst)**



6. Choose **Browse** and select the file (Contact, Calendar, or tasks) you exported the click **Next**



7. Select Import items into the current folder and expand the folder and select Calendar, contact, or task as showing in the image



8. If you are prompted to confirm, Choose Ok as showing below



- Do the same steps to import your Calendar, tasks and notes

## How to Get Help

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Please contact [sabah.sawor@sterlingmutuals.com](mailto:sabah.sawor@sterlingmutuals.com) Tel: 519-256-8999 #2256

Or [abhatia@sterlingmutuals.com](mailto:abhatia@sterlingmutuals.com) Tel: 519-256-8999 #2269