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# **Turn Off Notifications**

- Select the File menu and choose Options
- In the left area that lists the various categories, select Mail
- In the Message Arrival section, beneath When new items arrive in my Inbox, uncheck all the checkboxes (no sounds, no notifications, no alerts!)
- Save

#### Effective Outlook Notification and Reminder Settings Video Tutorial >

## **Conversation View**

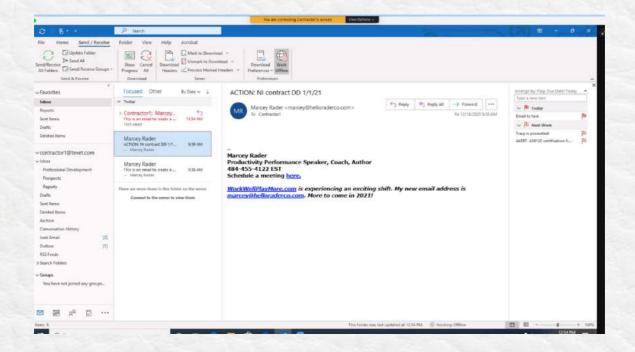
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Conversation and From Views for Cleaner Inboxes Video Tutorial 🔌

# **Working Offline**

- Working offline is a great way to focus on what's in your inbox without getting distracted by incoming messages.
- When you wish to sync and send, select *work* offline, let your emails sync, send, and download, then select *work* offline again to focus on the emails that are in your inbox.



# **Folder Structure**

#### **Consolidating folders**

To consolidate folders, open a folder, click *Control A* to highlight all items, and then right click to *Mov*e to the new folder.

#### **Favorite folders**

To keep your most-used folders at the top of your list, right click on them and *Add to Favorites*. When you are no longer using that folder because the project isn't active, remove it from your favorites.

## **Rules**

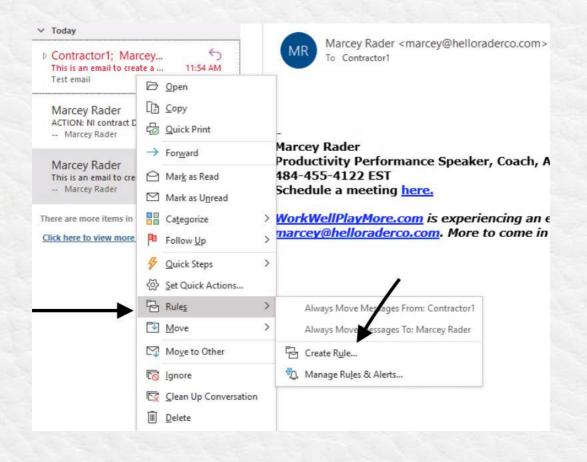
Use *Rules* to auto-filter notifications or updates you don't need to see, but want access.

- Right click on an email.
- Click Create Rule
- Select *From* and type in the name or a subject for the message.
- Select the folder you want it to go to Archives, Trash, Client Name, etc.
- Click Create Rule.
- Don't click Ok yet! Select Run this rule now on messages already in Inbox.

Rules for Auto Filing Video Tutorial  $\triangleright$ 

#### Automating emails from a specific sender into a folder

- 1. Open the email from the sender
- 2. Right click and select *Rules Move Always Move Messages From (SENDER)*
- 3. Highlight the desired target folder
- 4. Click Ok.



	Create Rule	optiona	u ×	
	When I get email with all of	the selected condition		
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	1	OK Cancel Advanced	d Options	
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- 1. In the mail window, select a folder (or Inbox), click the *View* tab, and then click *View* Settings in the Current Settings group.
- 2. Click Conditional Formatting in the resulting Advanced View Settings dialog box.
- 3. Click Add and give the new "rule" a name such as The Boss.
- *4.* Click the *Font* button, choose a color from the *Color* dropdown (pick one that is easy on the eyes), and click *OK*.
- 5. Click Condition and then click From.
- Find the contact, double-click it to add it to the *From* condition, and click *OK* four times. (If creating a rule for messages sent, make sure you add the name to the *Sent To* control.)

Outlook will display existing messages from the designated contact in the assigned color. It will also show new incoming messages in that color as they arrive. If the contact isn't in your Address Book, you can enter the contact's email address.

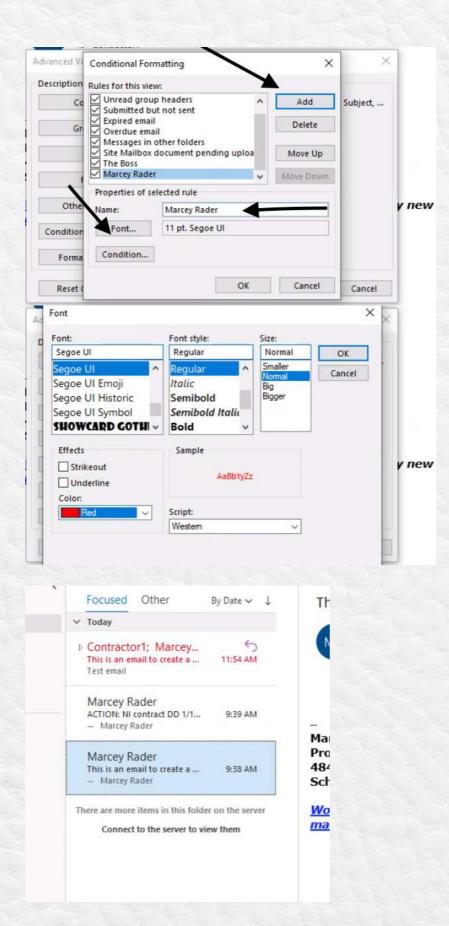
The name you're matching must **exactly** match the name Outlook displays in the *From*.

You can't use the same rule to assign a color to messages from and sent, even though the dialogs offer both options and will even let you specify both in the same rule.

Conditional formatting rules apply only to the current folder, but you can add the same rule to multiple folders. Always start by selecting the right mail folder (#1).

# Only add colors for 2-3 people or projects, or you will get too many colors and will ignore them.

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#### <u>Creating a Rule for Color Video Tutorial </u>▷

# **Ignoring Conversations**

When you get stuck on an email chain of congratulations, announcements, or anything else you don't want, choose to ignore the thread by selecting the email and clicking *Ignore*. Future emails from that thread will go to your deleted folder rather than clutter up your inbox.

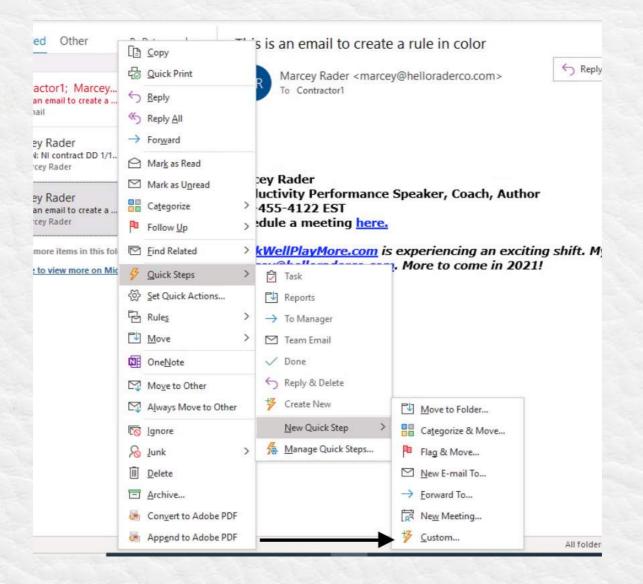
If you change your mind, you can go to the email in your *Deleted Items* folder, select it and click the *Ignore* button again to disable it.

FILE	Home	Send /	Receive
87778-58	IIII h	Ignore Clean Up + Junk + Delete	Delete
New		Delete	

# Tasking

#### **Quick Step for Tasking**

Don't use your inbox as your task list! You can't prioritize, and you have to look at what you need to do repeatedly. For team projects, I recommend using a project management task system like Planner, Asana, or ClickUp, and not delegating through email You can use Planner, ToDoist, or the native Outlook for personal tasks if you have simple tasking to perform. **I do not recommend creating flags.** Again, you can't prioritize by date, it stays in the Inbox, and most people end up having hundreds of red flags they never clear out.



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You can take extra action to delete the message. If you like to put everything in files, select *Always ask for folder*, to it is saved in your task list and your selected folder.

#### Tasking from Email Video Tutorial $\triangleright$

#### How to add tasks to an Outlook calendar

- 1. On your calendar screen, click View
- 2. Click Daily Task List
- 3. Click Normal.
- 4. Drag and drop a task into a calendar item for a specific time.

# **Meeting Request**

#### Turn off meeting request responses.

In a new meeting request, do the following:

1. On the Meeting tab, in the Attendees group, click Responses.

NOTE: For recurring meetings, the *Meeting* tab appears as the *Recurring Meeting* tab.

2. Click *Request Responses* to clear the *Request Responses* and

Allow New Time Proposal checkboxes.



**NOTE**: If you turn off the *Request Responses* option, you will not be able to track whether attendees have accepted, tentatively accepted, or declined. For instance, when you open the meeting in your calendar, click the *Meeting* tab, and then click *Tracking* in the *Show* group, the *Response* column will display *None* for all of the attendees. Instead, you could create a rule that meeting responses go directly to your *archives*, *trash*, or another folder.

#### Turn off responses after you send the meeting request.

Even if you don't turn off the response option when you initially send the meeting request, you can change the option at any time.

- 1. Open the meeting.
- 2. On the Meeting tab, in the Attendees group, click Responses.

NOTE: For recurring meetings, the *Meeting* tab appears as the *Recurring Meeting* tab.

- 3. Click Request Responses to clear the Request Responses and Allow New Time Proposal checkboxes.
- 4. Click Send Update, so the meeting request updates in Outlook for all meeting attendees.

# **Search folder**

There is no reason to scroll up and down your inbox to find an email anymore. If you are doing this, you got into the habit with older versions of Outlook. You can streamline your searching by going to the *Search Folders* on the left and creating a new Search Folder. Examples could be all your *Unread* or *Follow Up* or *Unread from NAME*.

#### How to Search All Folders in Outlook

This step is only necessary for older versions of Outlook. Create an Outlook Search Folder that will search through all of your mail in one step. It will not search inside any archived .PST files.

Create an All Mail Search Folder in Outlook

Search Folders



In the folder *Navigation list*, right click the header that says *Search Folders* and then select *New Search Folder*.

Select a Search Folder	:		
Mail from and to s			~
Mail from specific			
Mail sent directly to			
Mail sent to public	groups		
Organizing Mail			in.
Categorized mail			
Large mail			
Old mail			
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Custom			
Create a custom Se	arch Folder		v
Customize Search Fold	der:		
To specify criteria, click	Choose.		
		Choose.	22

Scroll to the bottom of the window and double click where it says *Create a custom* search folder.

Custom Search Folder		×
Mame: All Mail Search Folde	HT	
Select "Criteria" to specify what it Folder contains. Mail from these folders will be in	-	Criteria
.Lookeen Blog;Drafts;Junk-E-Mai	l;Lookeen 10;siobhai	Browse
	ОК	Cancel

Another window called the *Custom Search Folder* will open up. Type *All Mail Search Folder* in the Name field box, then click *Browse*.



Now select which folders you want to include in your *All Mail Search* folder. Uncheck the first item, and then check all of the folders you store your most important mail in. This will probably be your *Inbox*, the *Sent Items* folder, and any others you need to include in a global search. Check the box that says *Search Subfolders* at the bottom. Now click *OK*.

Microsoft Outlook			×
You have not specified any criteria for Do you want to continue?	this Search Folder. All me	ssages in the folders you have selected	will appear in this Search Folder.
	Yes	No	

Click *OK*. A box will show up saying that you have not specified any criteria. Click *Yes* at this error because you don't want to create any requirements for this.



Now click OK again, and you should now see the All Mail Search folder in the

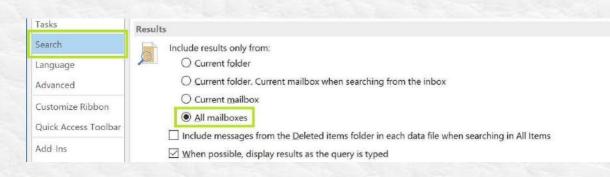
Search Folder List. It may take some time to load the first time. After it has loaded, arrange the folder by *Dat*e.

#### Search All Folders by Default in Outlook 2010 and 2013

Set up Outlook to search the items within All Folders by default.

Click File and then select Options.

In the Outlook Options window, click Search, choose the All mailboxes option.



Click OK. You will now search all folders by default in Outlook 2010 and 2013.

#### All/Unread vs. Focused/Other

With *Focused* and *Other*, you will only get emails from within your organization in the focused mailbox and newsletters and emails outside the organization in your Other mailbox. This method works well if you mostly communicate internally.

# **Message Templates**

#### Creating an email message template

- 1. New group New E-mail.
- 2. In the message body, enter the content that you want.
- 3. File tab.

- 4. Click Save As.
- In the Save as box, click Outlook Template in the Save as type list (do not save it to My Documents or some other folder). Type a name for your template, and then click Save.

#### Sending an email message from a template

- 1. Select New Items (upper left corner) > More Items > Choose Form.
- 2. Look In, click User Templates in File System.
- The default templates folder is opened
   c:\users\username\appdata\roaming\microsoft\templates. If your template
   is saved in a different folder, click *Browse*, and find it.
- 4. Select the template, and click Open.
- 5. You can make changes to the subject and message body.

Note - Changes made aren't saved to the template. It will create a draft of your current message if you save but won't update the template.

## **Delay or Schedule Sending Email Messages**

You can delay the delivery of an individual message or you can use rules to delay the delivery of all messages by having them held in the Outbox for a specified time after you click Send.

#### Delay the delivery of the message

 While composing a message, select the More options arrow from the Tags group in the Ribbon.



2. Under **Delivery options**, select the **Do not deliver before** check box, and

then click the delivery date and time you want.

23	Have replies sent to					Select Names
	Do not deliver before	5/2/2018	~	5:00 PM	~	
	Expires after	None	4	12:00 AM	¥	

- 3. Click Close.
- 4. When you're done composing your email message, select Send.

After you click Send, the message remains in the Outbox folder until the delivery time.

If you decide later that you want to send the message immediately, do the

following:

- 1. Switch to the **Outbox** folder.
- 2. Open the delayed message.
- 3. Select the More options arrow from the Tags group in the Ribbon.



- 4. Under Delivery options, clear the Do not deliver before check box.
- 5. Click Close and send.

Note: Outlook must be online and connected for this feature to work.

Delay the delivery of all messages

You can delay the delivery of all messages by up to two hours by creating a rule.

- 1. Click File.
- 2. Click Manage Rules & Alerts.

- 3. Click New Rule.
- 4. In the Step 1: Select a template box, under Start from a Blank Rule, click Apply rule on messages I send, and then click Next.
- In the Step 1: Select condition(s) list, select the check boxes for any options that you want, and then click Next.

If you do not select any check boxes, a confirmation dialog box appears. If you click Yes, the rule that you are creating is applied to all messages that you send.

- In the Step 1: Select action(s) list, select the defer delivery by a number of minutes check box.
- 7. In the Step 2: Edit the rule description (click an underlined value) box, click the underlined phrase a number of and enter the number of minutes for which you want the messages to be held before it is sent. Delivery can be delayed up to 120 minutes.
- 8. Click OK, and then click Next.
- 9. Select the check boxes for any exceptions that you want.
- 10. Click Next.
- 11. In the **Step 1: Specify a name for this rule** box, type a name for the rule.
- 12. Select the **Turn on this rule** check box.
- 13. Click Finish.

After you click **Send**, each message remains in the **Outbox** folder for the time that you specified.

#### Recall or replace an email message.

With message recall, a message you sent is retrieved from the recipients who haven't yet opened it from the mailboxes. You can also substitute a replacement message.

For example, suppose you forgot to include an attachment. In that case, you can attempt to retract the message and then send a replacement message with the attachment.

Message recall is available after you click *Send* and is available only if both you and the recipient have a Microsoft 365 or Microsoft Exchange email account in the same organization.

#### **Newer versions**

- In the folder pane on the left of the Outlook window, choose the Sent Items folder.
- Open the message that you want to recall. You must double-click to open the message. Selecting the message, so it appears in the reading pane, won't allow you to recall the message.
- 3. From the Message tab, select Actions > Recall This Message.

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File Message	Help Acrobat Q Reply Reply Forward B All Respond	Tell me what you wan	t to de		Mark Unread Categorine ~ P Fellow Up ~ Cdt Message	で Translate こ Editing	A() Read Aload Speech	Q Zoom Zoom	) Insights	Cloud Ero NetSuit Celigo	e Report	
RE: This is an Contract	sctor1	Il recall a me	ssane fr		Recall This Message Regend This Message Wew in Browser Other Actions Our Secot folds		inient l	r Reply رو		Reply All	Forward     Fei 12/18/20.	0 1.06 PM
fo: Marcey Rader 😋	ber 18, 2020 11:54 AM narcey@helloraderco.com> n email to create a rule											

Recall This Message	×
Some recipients may have already read this me	essage.
Message recall can delete or replace copies of t Inboxes, if they have not yet read this message.	
Are you sure you want to	
Delete unread copies of this message	
O Delete unread copies and replace with a	new message
Tell me if recall succeeds or fails for each rec	ipient
	OK Cancel
	Cancer

#### Notes:

- If you don't see the Recall This Message command, you probably don't have an Exchange account, or the feature isn't available within your organization.
- You cannot recall a message that's protected by Azure Information Protection.
- You cannot recall a message in Outlook on the web.
- 4. Click Delete unread copies of this message or Delete unread copies and replace with a new message, and then click OK.
- 5. If you're sending a replacement message, compose the message, and then click Send.

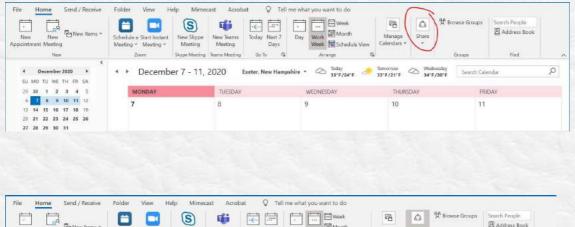
# To Enable or Disable Notifications of Completed Print Jobs

- 1. Click Start, and then click Printers and Faxes.
- 2. On the File menu, click Server Properties.
- 3. On the Advanced, click the options you want to apply:
  - Show informational notifications for local printers. This option notifies users when a job is printed on a printer that is attached to this computer.

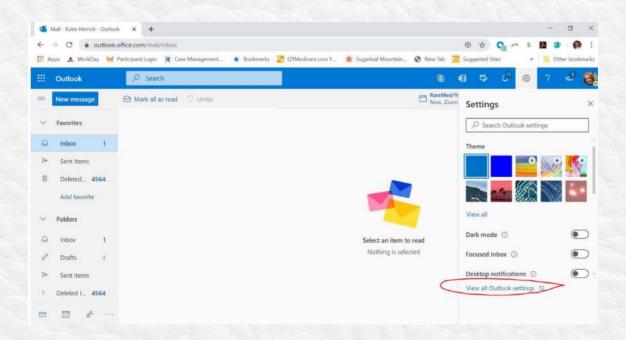
- b. Show informational notifications for network printers. This option informs users of this computer when a job is printed on a remote computer.
- 4. For client computers that are running versions of Windows earlier than Microsoft Windows 2000 that access the printers on this computer, there are additional configuration options to choose from:
  - a. Notify when remote documents are printed. This option sends a message to the user who sent a job to a printer attached to this computer.
  - Notify computer, not user, when remote documents are printed. This option sends a message to the computer from which the print job was sent, regardless of which computer the sending user is currently logged on.

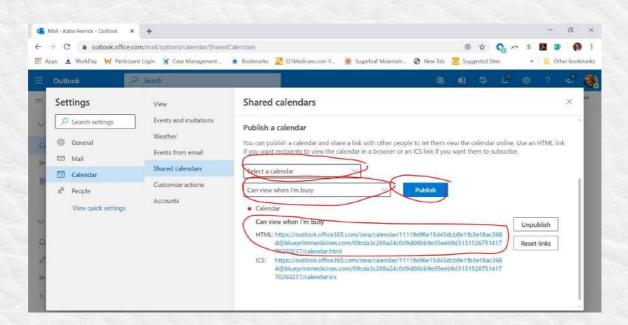
# **Publishing a Calendar for External Viewing**

Suppose you don't have a scheduling system like Acuity, Book Like a Boss, or Calendly, and often have meetings with external clients or vendors. In that case, you can publish your calendar for external viewing. To make it easy for people to schedule with you, provide a hyperlink to your calendar in your signature line, or provide it when scheduling meetings.



New New New Items ~	Schedule a Start Instant Meeting ~ Meeting ~ Zzom Skype Meeting	New Teams Today N	Vays Week Schedule View	Manage Sha Calendars V	re	Search People	
*         December 2020         *           SU MO TU WE TH FR SA         25 30 1 2 3 4 5	<ul> <li>December 7 - 11,</li> <li>MONDAY</li> </ul>		Mampshire * 🗠 Today 33°F/24°F	Tomorrow Barry 21"F	3 QM	Ca galendar	٩
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07*		Calendar - kherrick@b	lueprintmedicines.com - Outlook			60 <del>~</del> 0	×
File Home Send / Receive	Folder View Help Mimer	cast Acrobat 🖓	Tell me what you want to do				
New New Items >	Schedule a Start Instant Meeting * Meeting zoom Skype Meeting		and hand fill Month	Manage Calendars *	frowse Groups	Search People	~
New New PNew Items ~	Schedule a Start Instant New Skype Meeting * Meeting * Meeting	New Teams Meeting Da Teams Meeting Go Yo	rt 7 Day Work To Schedule View	Manago Share Calendars * *	Groups	Address Book Find	<u>م</u>





# **Speed Reading**

To read your email faster in *Reading Pane* view, you can use the space bar to move down the message and then go to the next message. Go into *Options – Mail – Outlook Pane –* check *Single key reading using space bar*. Only do this if your current way of reading isn't working for you. This Outlook Go-To Guide is designed to help you set up your email for maximum efficiency and only the beginning of what Outlook can provide. However, the best systems and tools mean nothing when the behaviors aren't effective. Start with the system and follow with the actions.

# need help with that?

We're here for you for private and team coaching. Contact us at <u>hello@helloraderco.com</u>.

