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OUTLOOK

Go-To Guide



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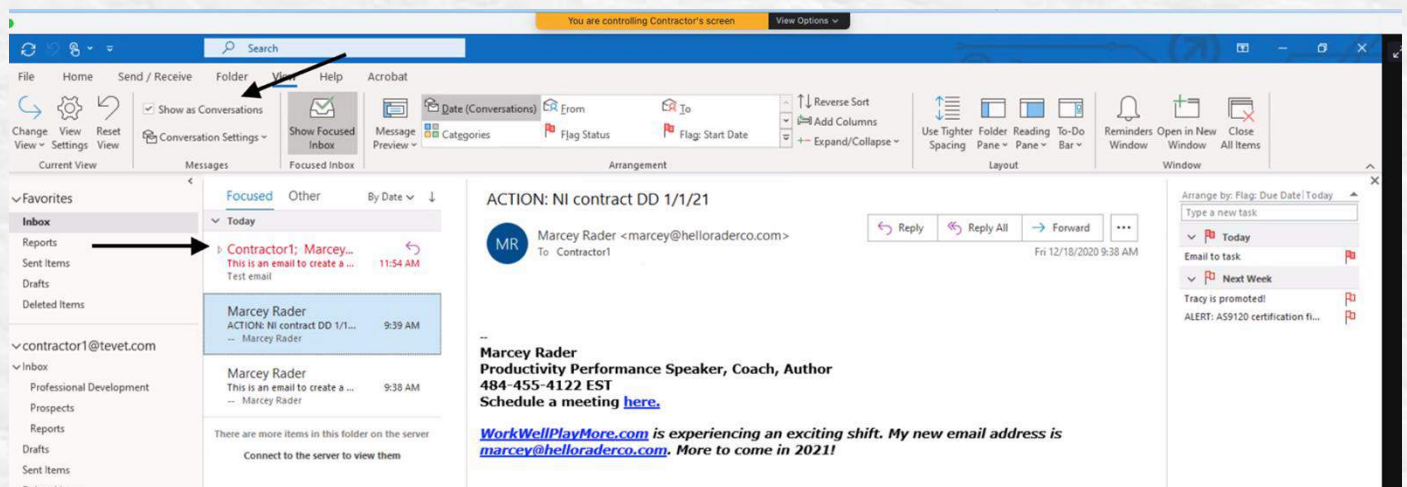
Turn Off Notifications

- 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

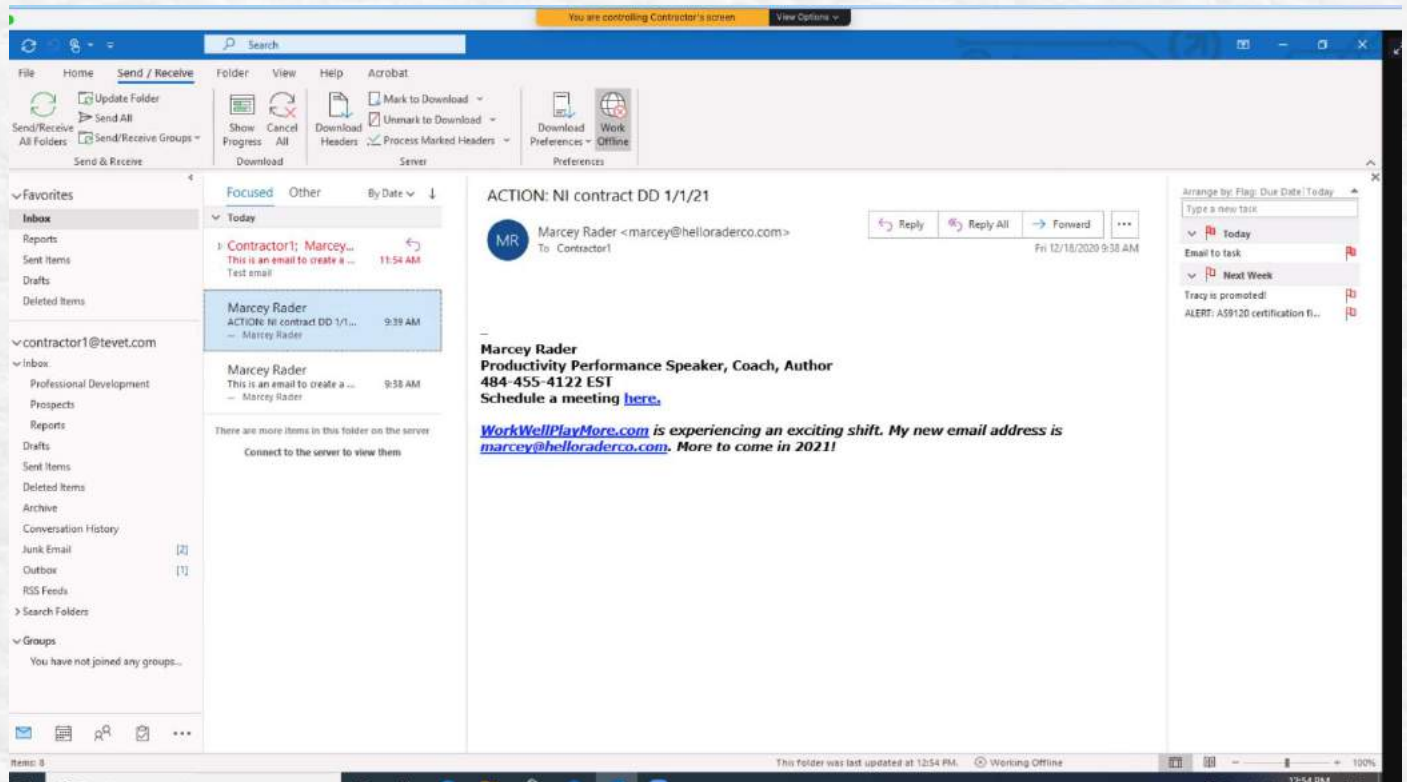
View - Conversations - Show as Conversations



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 *Move* 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

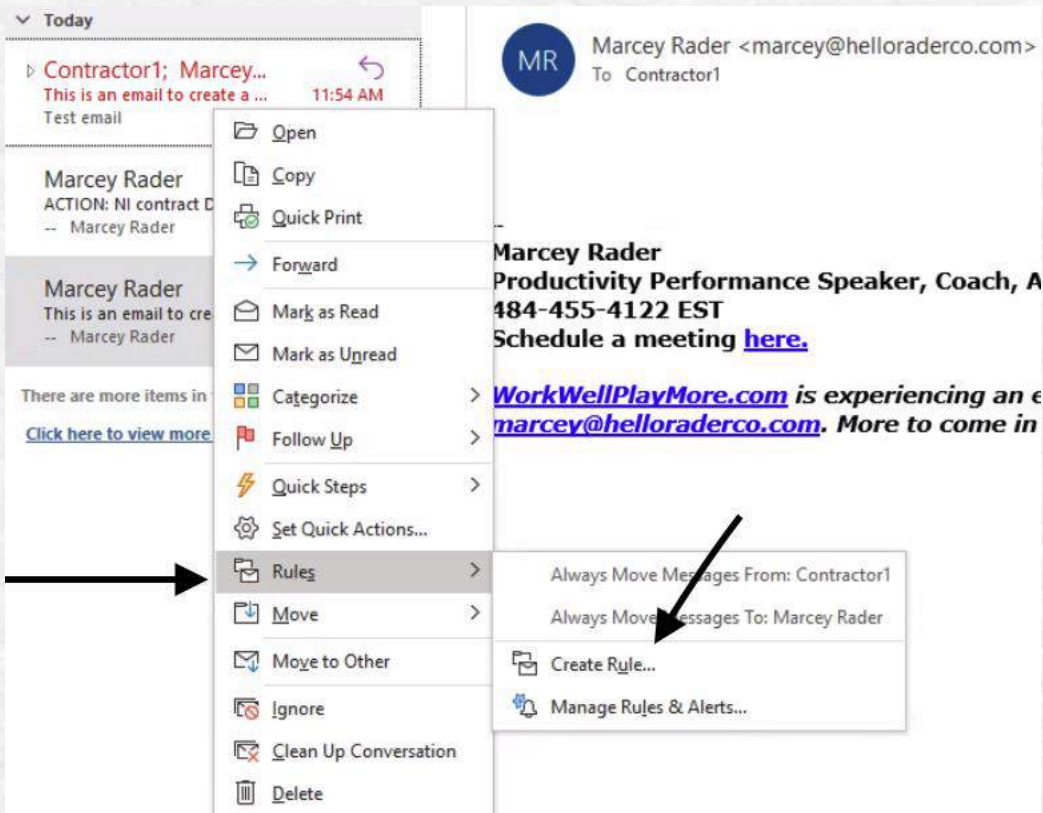
Use *Rules* to auto-filter notifications or updates you don't need to see, but want access.

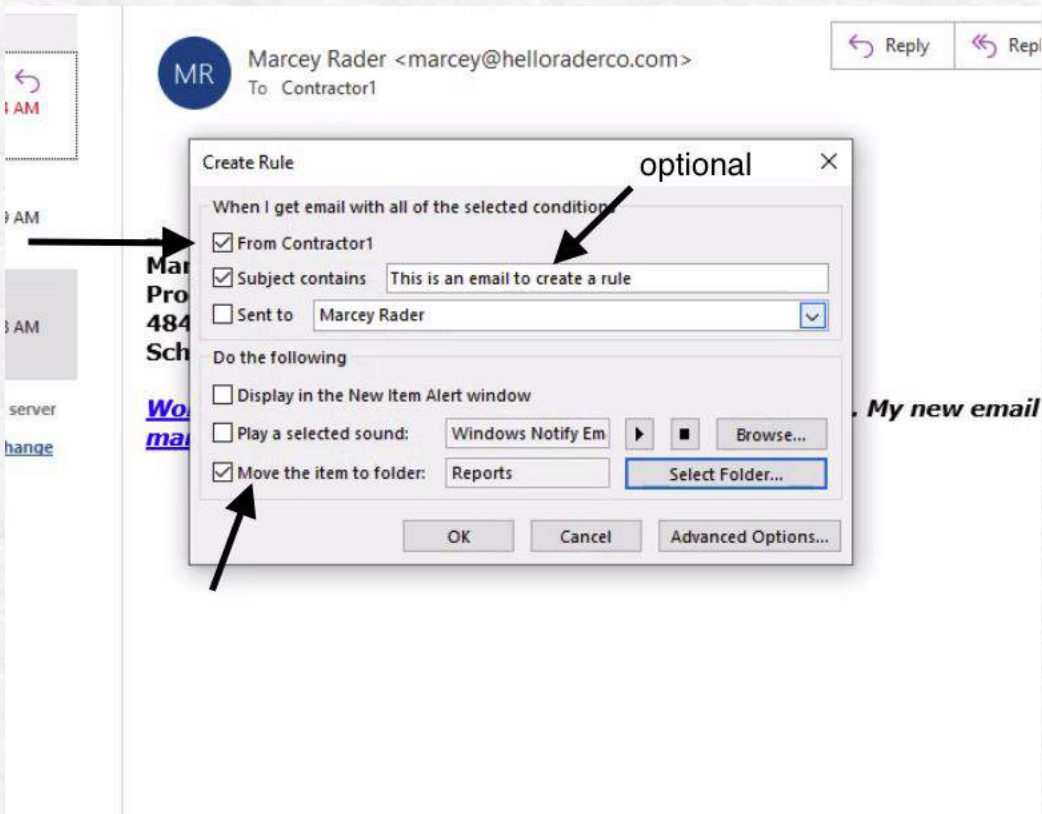
- Right click on an email.
- Click *Create Rule*
- Select *From* and type in the name or a subject for the message.
- Select the folder you want it to go to – *Archives, Trash, Client Name*, etc.
- Click *Create Rule*.
- Don't click *Ok* yet! Select *Run this rule now* on messages already in Inbox.

[Rules for Auto Filing Video Tutorial >](#)

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*.





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*.
6. 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.

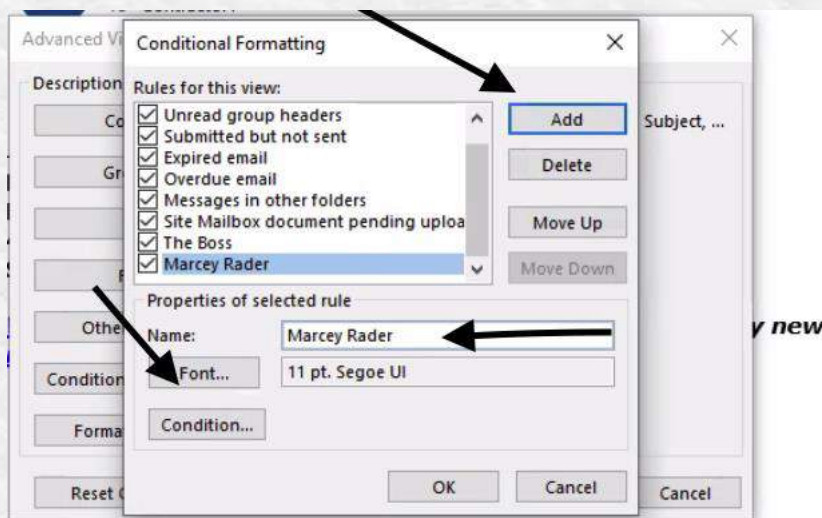
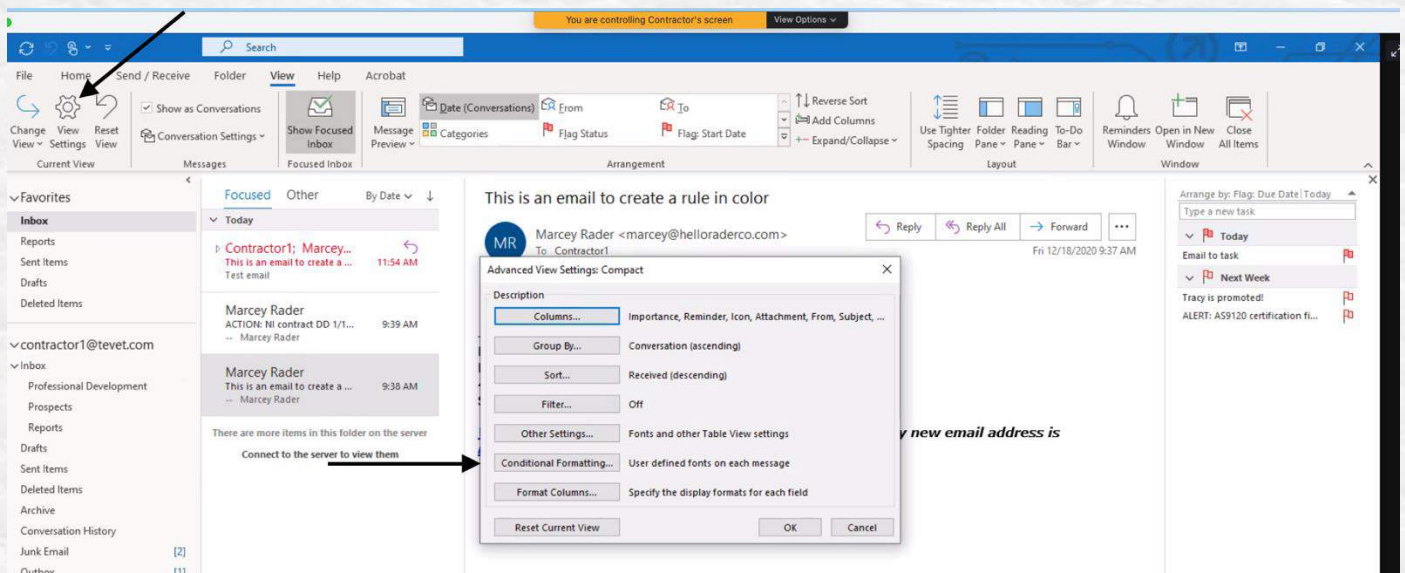
If the contact isn't in your Address Book, you can enter the contact's email address.

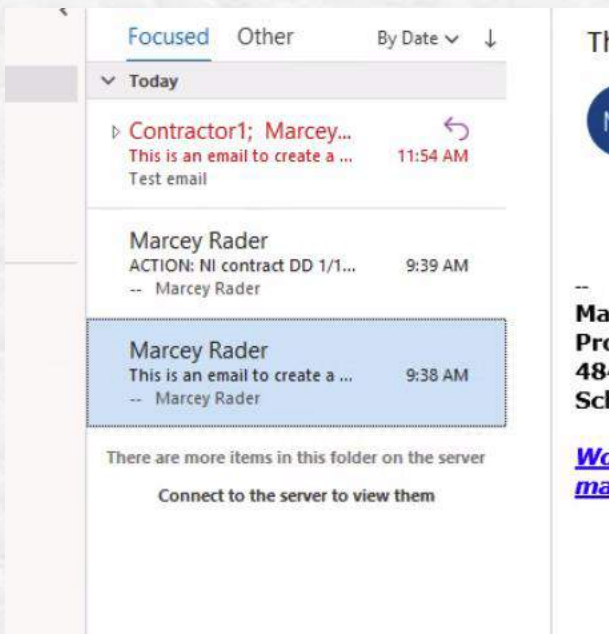
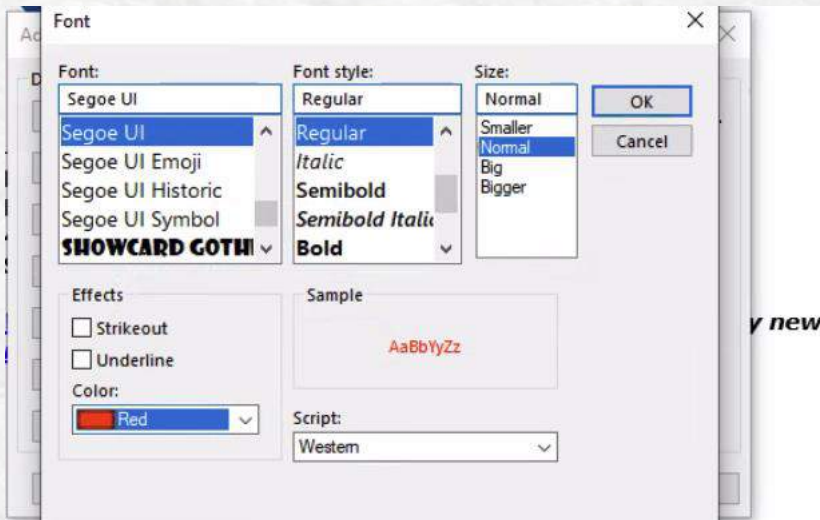
The name you're matching must **exactly** match the name Outlook displays in the *From*.

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.





[Creating a Rule for Color Video Tutorial >](#)

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.

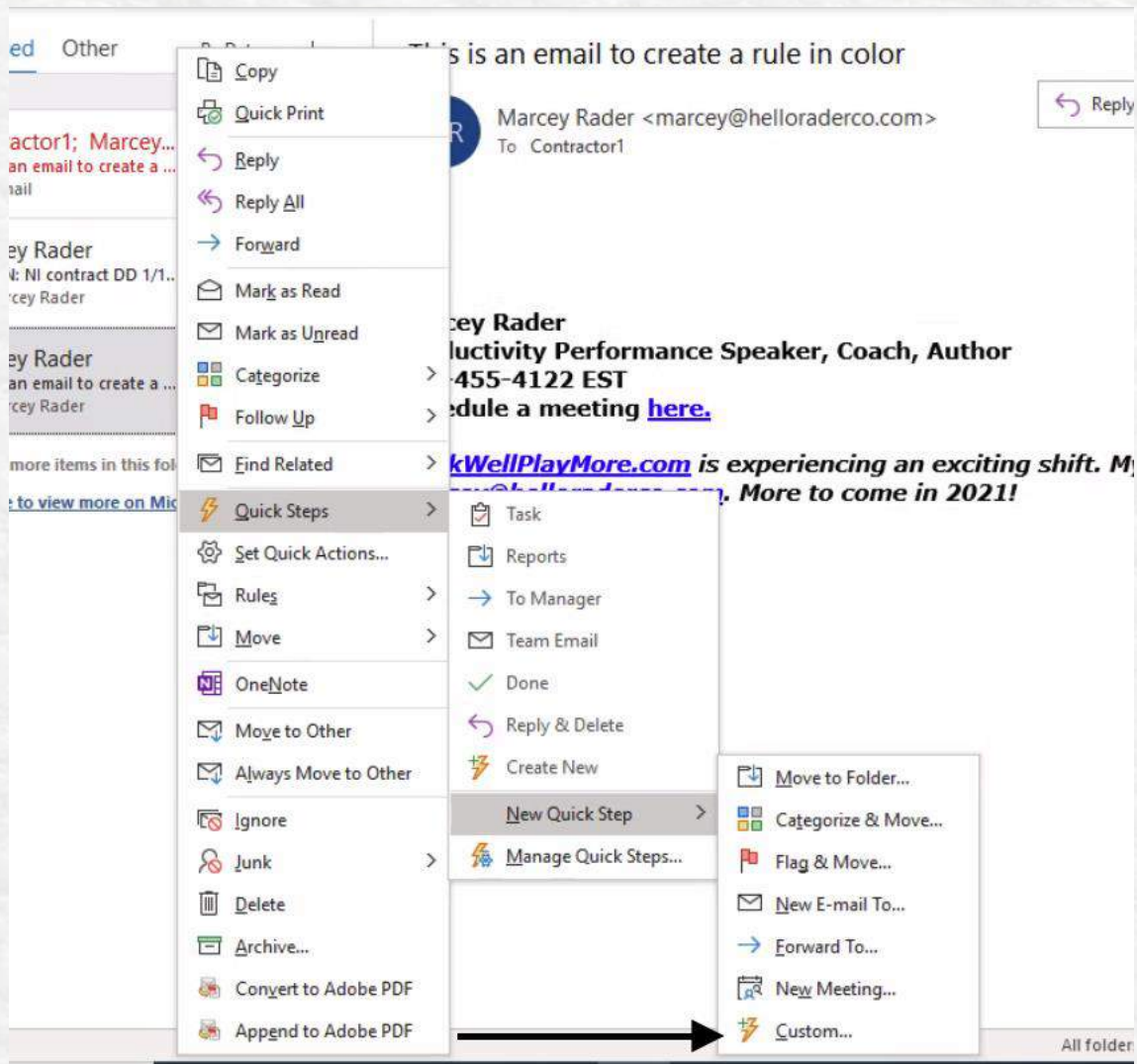


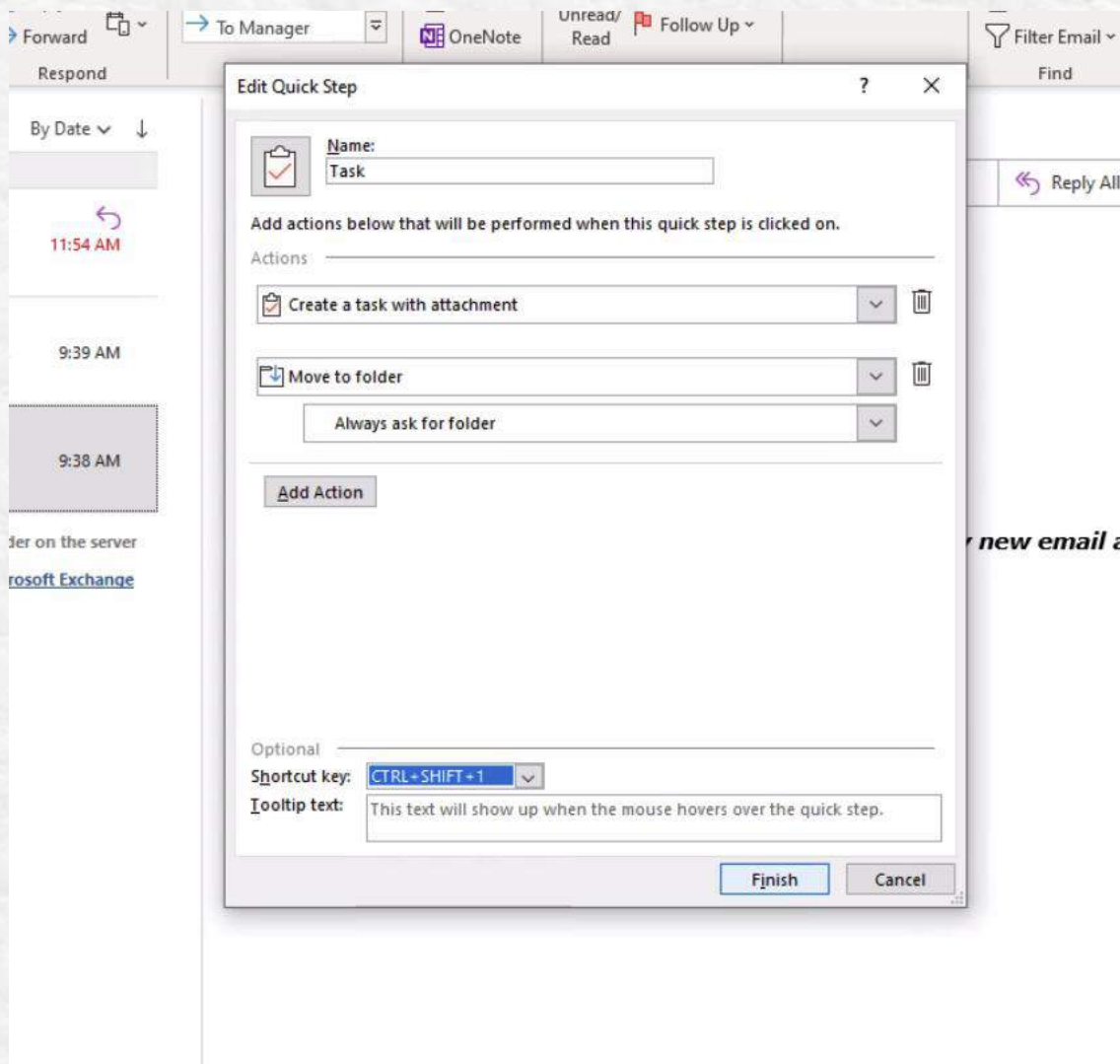
[**Ignoring Conversation Video Tutorial**](#) ▷

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.





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 >](#)

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

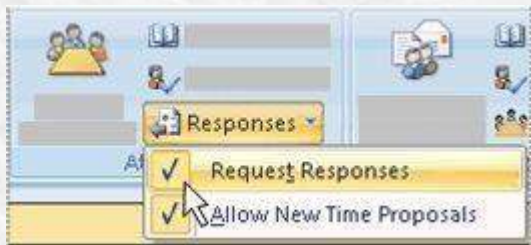
Turn off meeting request responses.

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.

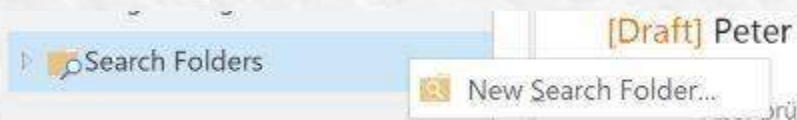
Search folder

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.

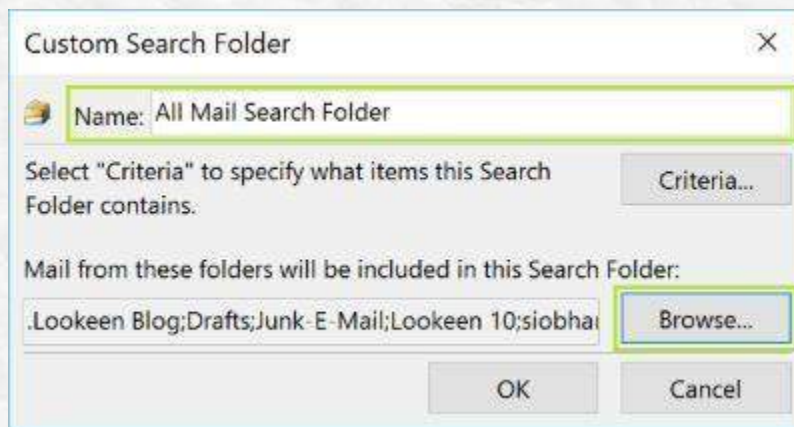
Create an *All Mail* Search Folder in Outlook



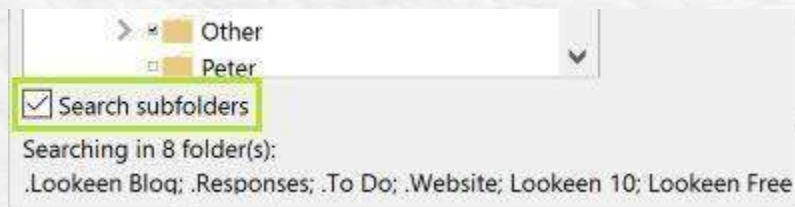
In the folder *Navigation list*, right click the header that says *Search Folders* and then select *New Search Folder*.



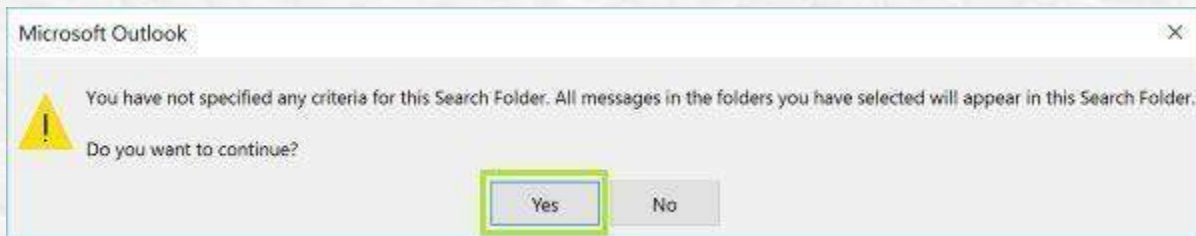
Scroll to the bottom of the window and double click where it says *Create a custom search folder*.



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*.



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.



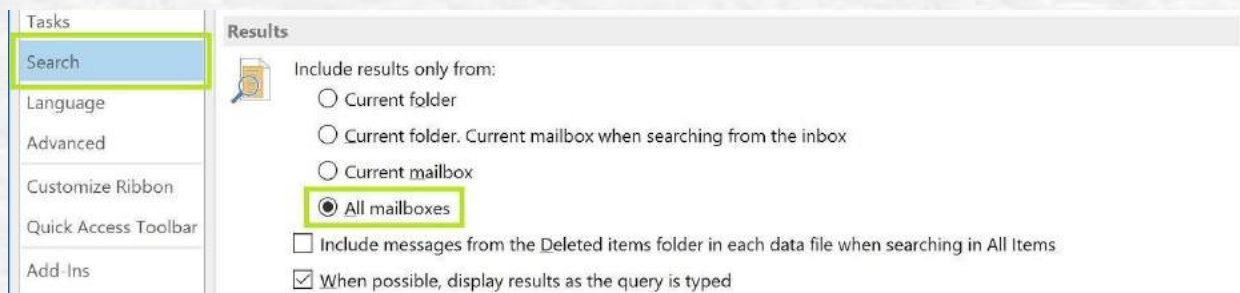
Now click *OK* again, and you should now see the *All Mail Search* folder in the *Search Folder* List. It may take some time to load the first time. After it has loaded, arrange the folder by *Date*.

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*.
5. 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*.
3. 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.

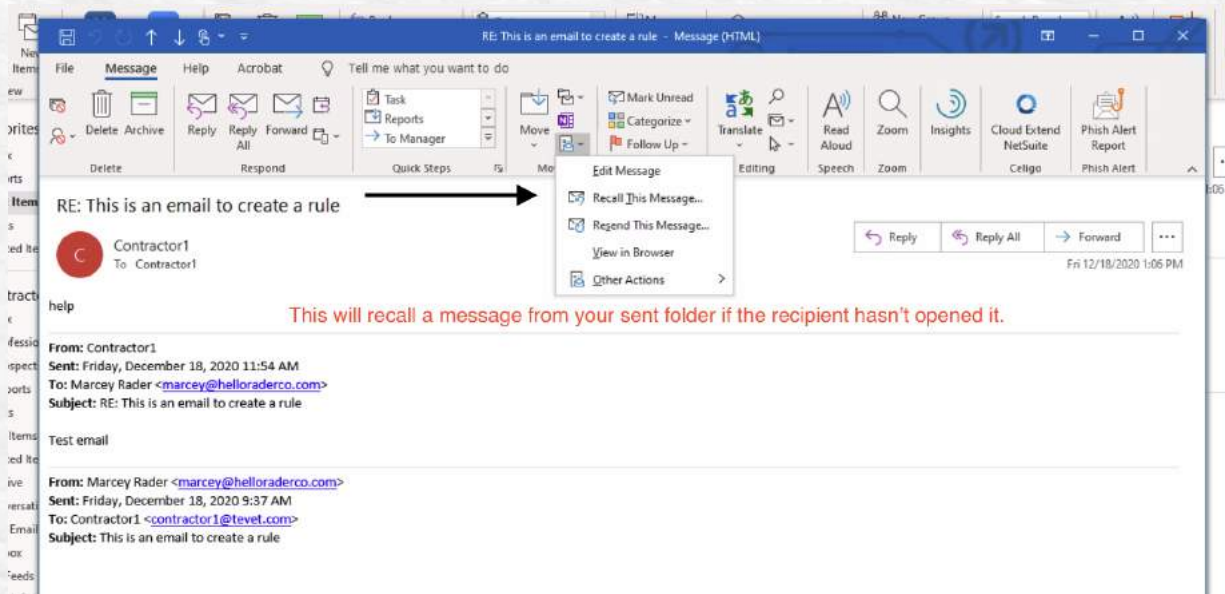
Recall or replace an email message.

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

1. In the folder pane on the left of the Outlook window, choose the *Sent Items* folder.
2. 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*.



Notes:

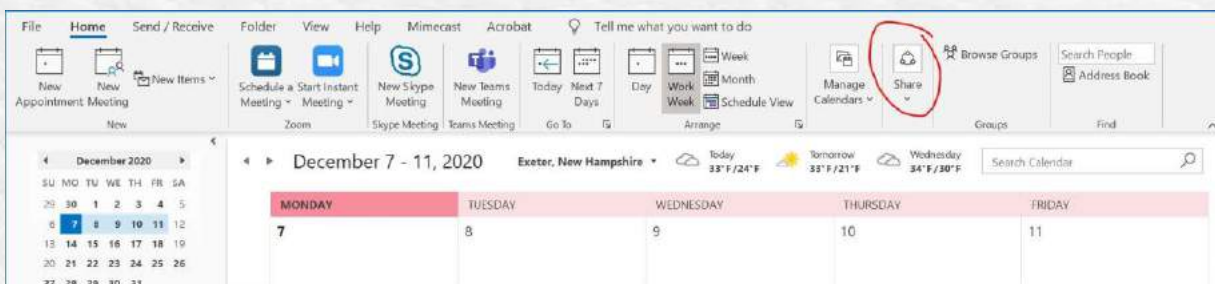
- If you don't see the *Recall This Message* command, you probably don't have an Exchange account, or the feature isn't available within your organization.
 - You cannot recall a message that's protected by Azure Information Protection.
 - You cannot recall a message in Outlook on the web.
4. Click *Delete 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*.

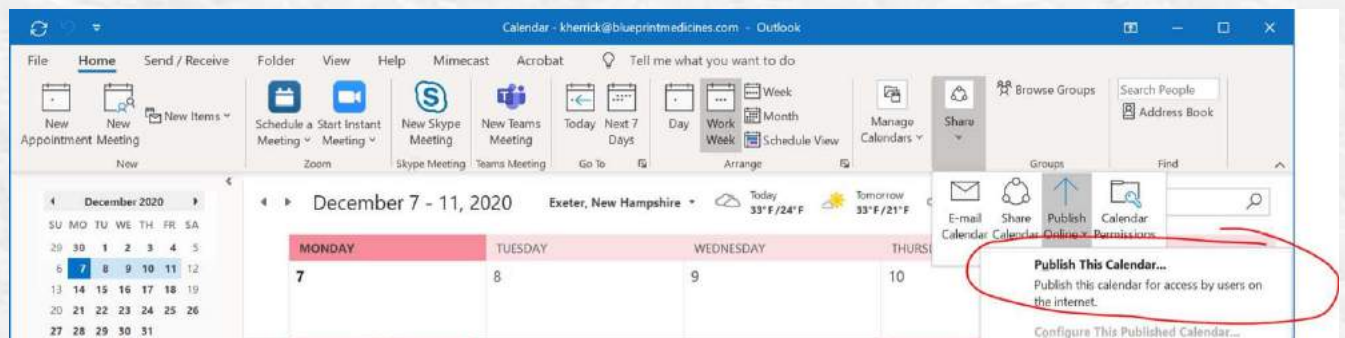
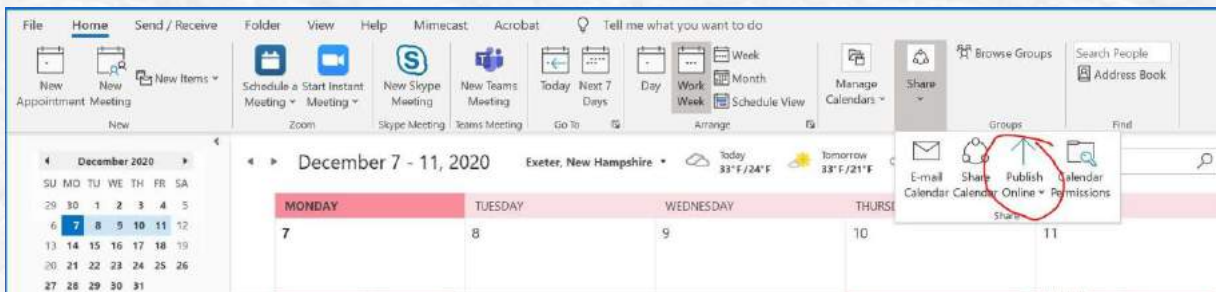
To Enable or Disable Notifications of Completed Print Jobs

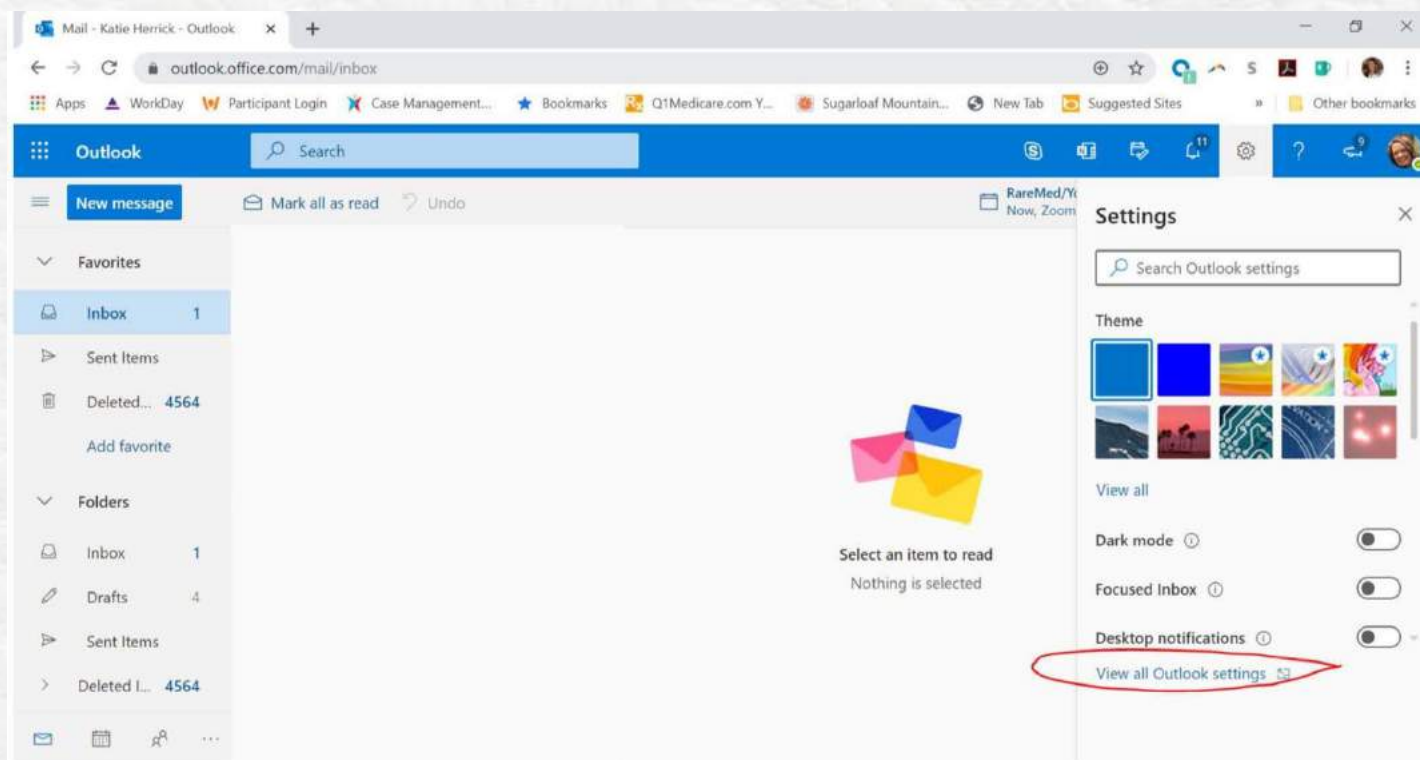
1. Click *Start*, and then click *Printers and Faxes*.
2. On the *File* menu, click *Server Properties*.
3. On the *Advanced*, click the options you want to apply:
 - a. Show informational notifications for local printers. This option notifies users when a job is printed on a printer that is attached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

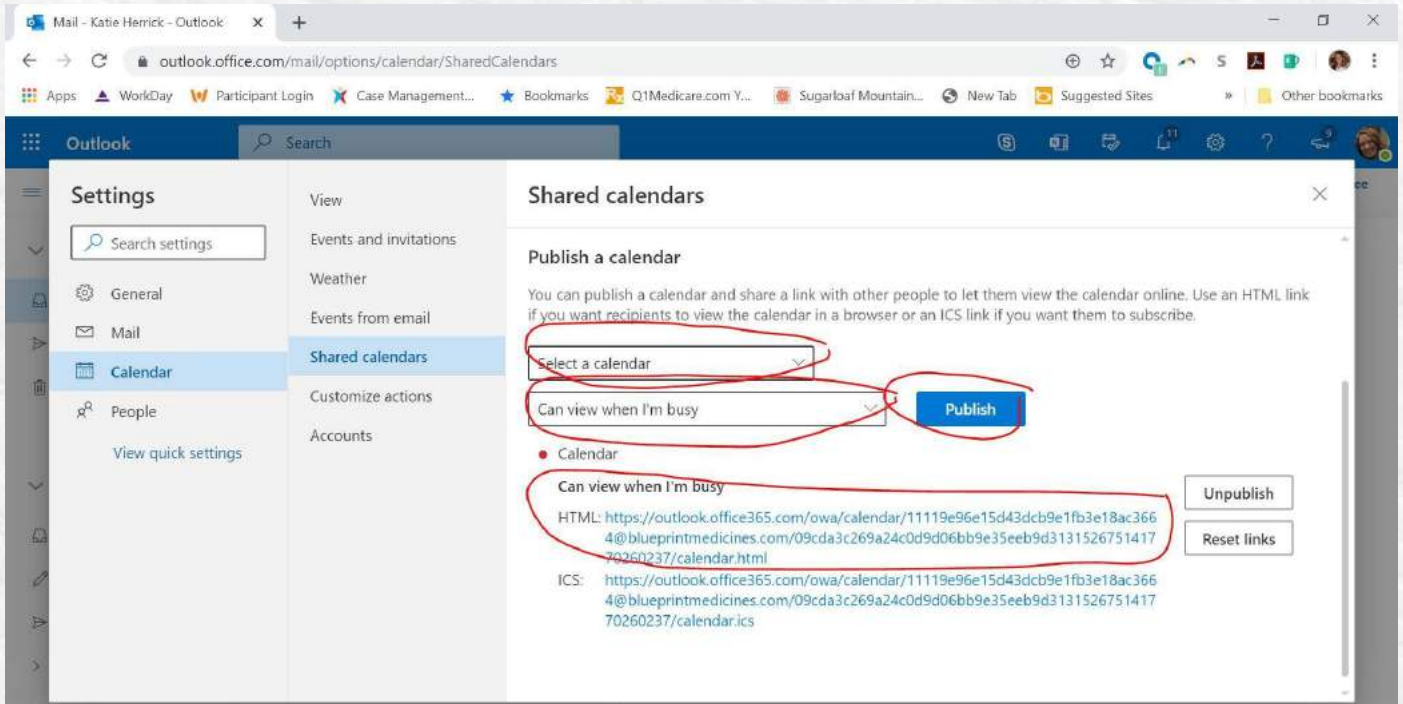
Publishing a Calendar for External Viewing

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.









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 hello@helloraderco.com.