



MAIL Tips – Read it once and act on it

Apply a Decision-Making Model to Manage Your Mailbox

ACTION	What to do/which menu option to use
From an email, create: a contact, appointment, or task	Select and drag the email to the icon in the navigation bar (bottom left-hand pane of the screen)
Respond to an email with a meeting	Home Ribbon > [Respond] Reply with Meeting
Respond to an email with a chat in Teams	Home Ribbon > [Respond] IM
Respond to an email by forwarding it as an attachment	Home Ribbon > [Respond] More Respond Actions

MAIL Tips – View Ribbon

Setup Views to Work Through Volumes of Email

ACTION	What to do/which menu option to use
Change the font size in the message list, the Reading Pane, or when composing a message	View Ribbon > [Current View] View Settings > Other Settings
Add a conditional formatting rule for your Inbox	View Ribbon > [Current View] View Settings > Conditional Formatting > Add
Use the conversation view in your Inbox	View Ribbon > [Messages] Show as Conversations (check-box)
Turn Focused Inbox on and off	View Ribbon > [Focused Inbox] Show Focused Inbox
View the To-Do Bar	View Ribbon > [Layout] To-Do Bar

MAIL Tips – Folders

Setup a Simple and Effective Folder System

ACTION	What to do/which menu option to use
Create folders	In the left pane, right-click where you want to add the folder, and then click New Folder OR use the Folder Ribbon > [New] New Folder
Add folders to Favorites	Click a folder and drag it to Favorites (top of the left pane) OR Right-click the folder you want to add > Show in Favorites



MAIL Tips – Home Ribbon

Assign Useful Categories with Colors to Organize Emails
Automate your Most Repetitive Tasks

ACTION	What to do/which menu option to use
Tag emails with a color category	Home Ribbon > [Tags] Categorize
Create a Quick Step to use when needed (NOT automatically applied when a message is received) <i>*once applied, a Quick Step may not be undone</i>	Home Ribbon > [Quick Steps] Create New
Set-up a rule that will be automatically applied when a message is received	Based on a selected email: Home Ribbon > [Move] Rules > Create Rule OR Home Ribbon > [Move] Rules > Manage Rules & Alerts > New Rule

MAIL Tips – Home Ribbon > [New] New Email

Automate your Most Repetitive Tasks

All of these options work when creating a new email, replying to an email, or opening a draft email

ACTION	What to do/which menu option to use
Create a personalized signature	Insert Ribbon > [Include] Signature > Signatures
Create a Quick Part (or Autotext)	Enter text in the body of the email to save as a Quick Part/Auto Text + Highlight the text Insert Ribbon > [Text] Quick Parts > Save Selection to Quick Part Gallery OR Autotext
Create a template	Home Ribbon > [New] New Email > File > Save As > Save as type: Outlook Template To use a template: Home Ribbon > [New] New Items > More Items > Choose Form > Look In: User Templates in File System



MAIL Tricks

ACTION	What to do/which menu option to use
Autocorrect – replace text as you type	File > Options > Mail > Compose messages: Spelling and Autocorrect > Autocorrect options: Autocorrect options Enter the abbreviation text in the Replace box, Click Add
Find related messages	Right click on the message > Find Related > Messages in this Conversation OR Messages from Sender
Share an email to Teams	Home ribbon > [Teams] Share to Teams
Search	Search box at the top of the Outlook window – broaden or narrow the search with the pull-down menu

MAIL Tips before you send an Email – Options Ribbon

All of these options work when creating a new email, replying to an email, or opening a draft email

ACTION	What to do/which menu option to use
Insert voting buttons or a poll into an email	Options Ribbon > [Tracking] Use Voting Buttons
Send an email at a future date/time	Options Ribbon > [More Options] Delay Delivery
Send an email from your Inbox, but, replies are sent to a different email account	Options Ribbon > [More Options] Direct Replies To
Display Bcc and From fields every time you create a new email or reply to an email	Options Ribbon > [Show Fields] Bcc From



TASKS Tips

ACTION	What to do/which menu option to use
Create a task from an email	Select and drag the email to the Task icon in the navigation bar (bottom left-hand side of the screen)
Create a new task	Home Ribbon > [New] New Task
Assign a task to someone else	Task Ribbon > [Manage Task] Assign Task > Send
Send a status report about the task to someone	Task Ribbon > [Manage Task] Send Status Report > Send

CALENDAR Tips and Tricks

ACTION	What to do/which menu option to use
Schedule time to work on a specific email	Select and drag the email to the Calendar icon in the navigation bar (bottom left-hand side of the screen)
Change the calendar view – day, week, month	Home Ribbon > [Arrange] Day Work Week Week Month
See a daily calendar for selected dates (not consecutive days)	Home Ribbon > [Arrange] Day In the monthly calendar on the left-hand pane, hold down the Ctrl key and select the days
Create a new calendar	Home Ribbon > [Manage Calendars] Add Calendar > Create New Blank Calendar

CALENDAR Tips – File > Options > Calendar

ACTION	What to do/which menu option to use
Set work hours (greys out time outside of those hours)	File > Options > Calendar > Work time
Set when to receive reminders for scheduled meetings – # of minutes, hours, days before the event	File > Options > Calendar > Calendar options
Change the default background color of meetings	File > Options > Calendar > Display options



CALENDAR Tips for meetings* – Appointment Ribbon | Meeting Ribbon

**Appointment = Outlook meeting invite | *Meeting = Teams meeting invite*

ACTION	What to do/which menu option to use
Set a meeting* as private - those with access to your calendar are unable to see the Title, Details etc.	Appointment Meeting Ribbon > [Tags] Private
Set a status for the meeting when blocking off time in a calendar – free, busy, out of office	Appointment Meeting Ribbon > [Options] Show As:
Set up a series of meetings* to be held at the same time every x days/weeks	Appointment Meeting Ribbon > [Options] Occurrence
Manually tag meetings* with a color category	Appointment Meeting Ribbon > [Tags] Categorize

CALENDAR Trick for conditional formatting

ACTION	What to do/which menu option to use
Set-up a formatting rule that will be automatically applied when a meeting* is added to the calendar	View Ribbon > [Current View] View Settings > Conditional Formatting > Add