


At the conclusion of this session you will be able to...

- Organize emails in folders
- Use keyboard shortcuts
- Create email templates
- Schedule an email for delivery
- Create Outlook rules
- Search for specific emails using keywords
- Set an email as a task or meeting

Create and Use Folders

- Stay organized
- Easy reference



Create and Use Folders

Email folders can be used for archiving or a way of managing incoming emails.

- Sub-folders of the inbox.
- Easily accessible.
- Created for YOUR style.
- There isn't a WRONG way to organize.

Create and Use Folders

Follow the steps below to create triage folders.

1. Right-click your "Inbox" folder and select "New Folder."
2. Title the first folder "To Do."
3. Right-click the "To Do" folder, select "New Folder," then name this folder "Someday."
4. Repeat step 3 creating a "Follow Up" subfolder under the "To Do" folder.

Create and Use Folders

- **To Do** – Drag non-urgent emails and emails that require more than 3 minutes to respond into this folder.
- **Follow Up** – Move emails to this folder that are put on hold.
- **Someday** – Some emails don't require a response. Instead, they're things you'd like to read/review one day when you have time (just remember to go back and read/review them).

Schedule time on your calendar every day to review and handle the items in your To Do folder.

Create and Use Folders

Now you have four folders for incoming emails and you can use all four to manage your tasks and keep your inbox clear.

- When a new email arrives, move it to the appropriate folder.
- The only emails that stay in your inbox are those that you should answer immediately. They're either urgent or can be handled quickly (in 3 minutes or less).

Use Keyboard Shortcuts

- Respond more efficiently to email
- Navigate your Inbox with ease
- Increase email productivity



Use Keyboard Shortcuts

Navigation

- Switch to Mail CTRL+1
- Switch to Calendar CTRL+2
- Switch to Contacts CTRL+3
- Switch to Tasks CTRL+4
- Switch to Notes CTRL+5
- Switch to Folder List CTRL+6
- Switch to Next Msg. CTRL+PERIOD
- Switch to Prev. Msg. CTRL+COMMA
- Go to a different folder CTRL+Y

Use Keyboard Shortcuts

Create an Item or File

- Create an appointment CTRL+SHIFT+A
- Create a contact CTRL+SHIFT+C
- Create a folder CTRL+SHIFT+E
- Create a meeting request CTRL+SHIFT+Q
- Create a message CTRL+SHIFT+M
- Create a note CTRL+SHIFT+N
- Create a task CTRL+SHIFT+K

Create Email Templates

- Consistent message
- Saves time



Create Email Templates

1. Open a new email and type the name of the template in the subject line.
2. Type the email and remove any signature.
3. Left click **File** then left click **Save As**.
4. When the **Save As** window opens, click the drop down **Save as type** and select **Outlook Template** then left click **Save**.

Retrieve Email Templates

1. Left click **New Items**, then highlight **More Items** then left click **Choose Form**.
2. Left click the drop down arrow in the **Look In** field and select **User Templates in File System**.
3. Locate the template to be used, highlight it and left click **Open**.

❖**Note:** If a signature is programmed for each email created, it will appear on the selected template. This is why it is important to remove the signature from the template when saving so there won't be double signatures.

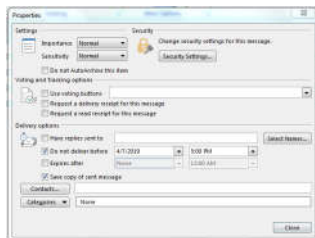
Schedule an Email for Delivery

- Send emails when they're most likely to be opened
- Never hesitate when clicking send
- Enjoy more flexibility

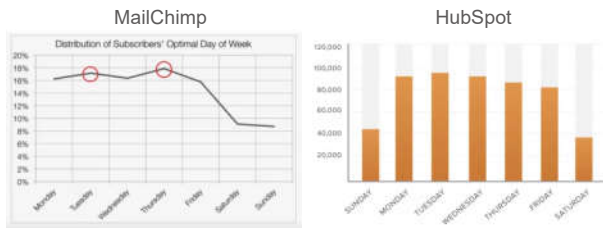


Schedule an Email for Delivery

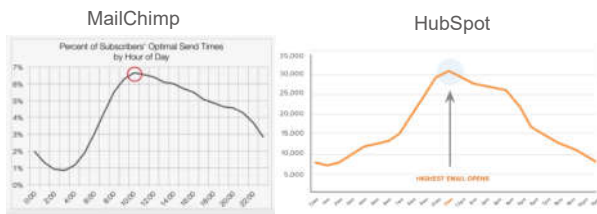
1. Create the email to be sent.
2. Left click **Options** on the top toolbar.
3. Left click **Delay Delivery** on the ribbon.



Schedule an Email for Delivery

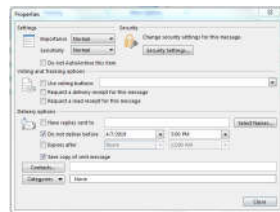


Schedule an Email for Delivery



BONUS!!!

- This is also where you can use the **Voting Buttons**.
- Poll your team!
- Response sent only to the sender so it's anonymous.



Create Outlook Rules

- Move messages to folders automatically
- Prioritize emails by their importance



Create Outlook Rules

All email that shows up in the Inbox is not the same. Consider segmenting them:

- **Most Important:** Email that is sent directly to me. I am on the to: line.
- **Kind of Important:** Email where I am cc:ed. I was copied on a mail, likely as an FYI to me.
- **External Mail:** Mail that was sent to me from **outside** my company.
- **Meeting Invites:** Just that. Someone wants me to show up somewhere.

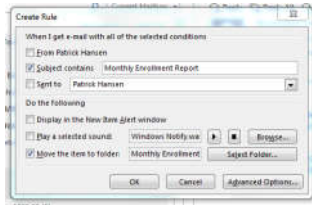
Create Outlook Rules

- Labeled folders using a numeric system so they are at the top.
- Rules based on:
 - Distribution lists
 - What is in the subject line
 - Who the email is from

| | |
|----------------------------|----|
| ▲ Inbox | 18 |
| ▲ 000-To Do | |
| Follow Up | 36 |
| Someday | 7 |
| 001-ProviderNetwork | 9 |
| 002-OnBase Email Reminders | |
| 003-ProviderContracting | 23 |
| 004-Needs Contract | |
| 005-Voice Mail Messages | 2 |
| 006-Faxes | |

Create Outlook Rules

1. Identify an email to create a rule for and left click on it.
2. Left click on **Rules** on the ribbon and select **Create a new rule**.
3. Create the rule using one of the options in the window to the right.



❖ **Note:** Once OK is selected, Outlook will ask to run the rule in the current inbox. This will move the emails that qualify to the selected folder.

Search for Specific Emails using Key Words

- Saves time
- Locate emails by:
 - From
 - Date
 - Subject
 - Importance
 - Attachments



Search for Specific Emails using Key Words

- Left click in the **Search** box



- Opens the **Search Ribbon**



Search for Specific Emails using Key Words



- **Scope:** In what folder(s) do you want Outlook to look?
- **Refine:**
 - In what field(s) do you want Outlook to look?
 - What time frame?
 - Was it high priority?

Set an Email as a Task or Schedule on the calendar

- Assists in organizing your work
- Reserves time in your day to dedicate to the email.



Set an Email as a Task or Schedule on the calendar

1. Identify the Email you wish to set as a Task or Schedule on the calendar.
2. Left click **and hold** on the email then drag it to either the Task or Calendar in the bottom left corner of the inbox.
3. The email will open into either the Task or Calendar event at which time you can apply the appropriate settings for scheduling.
4. Once that is complete, left click on Save & Close or Send, whichever is appropriate.

Resources



Resources

- Creating folders in Outlook 2016
• <https://www.youtube.com/watch?v=5ngZLfCHY4>
- Keyboard shortcuts in Outlook 2016
• <https://www.youtube.com/watch?v=4KqWl3SqRMM>
- Outlook Templates in Outlook 2016
• <https://www.youtube.com/watch?v=Cu9CsCkOBUs>
- Delay Delivery in Outlook 2016
• <https://www.youtube.com/watch?v=q8URRvXy7Jk>
- Creating Rules in Outlook 2016
• https://www.youtube.com/watch?v=mycEh_zkxJg
- Search Function in Outlook 2016
• <https://www.youtube.com/watch?v=KkN6tPUFyRc>
- Converting emails into Task & Calendar items in Outlook 2016
• <https://www.youtube.com/watch?v=YMhkNcB8k4>

Questions