

OUTLOOK - TOP 10 TIPS AND TRICKS

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1. OPEN CALENDAR IN A NEW WINDOW

For Windows users: Open your calendar (or tasks or contacts) in a new window by right-clicking on the icon in the bottom right-hand corner and selecting Open in New Window. You can open as many new windows as you need.

For Mac users: Click on File, then New, then Main Window. You can navigate to email, contacts, calendar, etc. You can even have two windows of the same type open, e.g., two email windows.

2. TO-DO BAR

For Windows users: View your calendar and email simultaneously in the same window by adding your calendar to the To-Bar. While viewing your email, click on the View ribbon. Then, in the Layout group, click on To-Bar and select Calendar.

For Mac users: To accomplish the same thing, click on the View menu, then Task Pane (or press Shift + CMD +]). You could also click the square icon with an arrow in the top right of the toolbar.

3. FOCUSED INBOX

For Windows users: Turn down the noise in your inbox by replacing the All and Unread quick filters with your Focused Inbox. On the View ribbon, click on Show Focused Inbox to enable it. Your most important emails will show up in the Focused Inbox. Use the Other quick filter at the top of your inbox to see your less critical emails.

For Mac users: While in Outlook's email module, on the menu bar, click View, then Turn on Focused Inbox.

4. CONVERSATIONS & CONVERSATION CLEANUP

For Windows users: Show emails as conversations to condense each email thread. On the View ribbon, check the Show as Conversations button in the Messages group.

Threads include a lot of redundant emails - each reply typically includes the entire thread. To delete redundant emails quickly, on the Home ribbon, click on Clean Up in the Delete group, and select Clean Up Folder or Clean Up Folder and Subfolders. Only emails with unique content (including attachments) will remain. See additional details here: <https://support.microsoft.com/en-us/office/use-conversation-clean-up-to-delete-redundant-messages-70179d54-fa57-48ce-95fd-416d72e5ccd4>

For Mac users: While in Outlook's email module, on the menu bar, click View, then Show as Conversations. Mac Outlook lacks a Conversation Clean Up feature.

5. DELEGATE WITH QUICK STEPS

For Windows users: Quick Steps combine multiple steps into a single click. Use them for anything that you do routinely, such as forwarding emails to others to handle.

Get started by clicking on the dropdown arrow in the Quick Step Gallery on the Home ribbon. Under New Quick Step, select Custom to see the full range of possibilities. Next, give your Quick Step a name and select your first Action (such as Forward).

Some Actions have options hidden under a Show Options link - be sure to click on that. For delegating emails, type the email addresses of the delegate(s) in the "to" field. Under Show Options, type your message (such as "Please handle this."). Check the box to Automatically send after one minute delay to have the email automatically sent when you use the Quick Step.

Click on the Add Action button to add additional actions, such as moving the email to a folder for delegated emails.

For Mac users: Outlook for Mac lacks the Quick Steps feature.

6. RULE FOR NEWS & PROMOTIONS

If your inbox is plagued with newsletters and other emails you want to read at some point down the road, set up a rule to automatically move newsletters and promotional emails out of your inbox and into a separate folder. Then, when you have time, you can read that email, but you don't have to deal with it on a daily basis.

Rules automatically process email that meets certain criteria. Unlike Quick Steps, they run in the background and don't require you to do anything beyond setting them up.

For Windows users: Start by clicking on the Rules button on the Home ribbon. Select Manage Rules and Alerts. In the Rules and Alerts dialog, click on New Rule. Under start from a blank rule, click on Apply rule on messages I receive. Click on Next to proceed to the conditions.

Check the box to apply the rule to emails with specific words in the body. Click on "specific words" and add "unsubscribe" to the Search list. Click on Next to proceed to the actions.

Check the box move it to the specified folder. Click on "specified" and select the folder you want your newsletters and promotions moved to. Click next to add any exceptions, then finish.

Be sure to keep an eye on your new folder in case non-newsletter/promotional emails inadvertently end up in there.

For Mac users: While in Outlook's email module, on the menu bar, click Tools, then Rules..., then the New Rule button. Give your rule a name. Under the "Select a condition" dropdown, under the Keywords section, select "Message body includes." Type the word "unsubscribe."

Under the "Select an action" dropdown, under the Organize section, select "Move to," then choose the folder you want your newsletters and promotions moved to. If you wish to make any exceptions to your rule, such as newsletters from a particular source, click on "Select an exception." You enter any exception(s) in the same way you chose the conditions above. Click Save at the bottom right to save your rule.

7. COLOR CODE YOUR CALENDAR

Color-code your calendar using categories. For example, use different categories for time out of the office (vacation days, doctor's appointments), client meetings, internal meetings, and court. Then you can tell at a glance what types of appointments your day holds.

For Windows users: You can filter your calendar to show appointments of a particular category using the View Settings button on the View ribbon. Select filter and the desired category. This view is especially helpful for seeing upcoming court dates.

For Mac users: The newest version of Outlook for Mac (released in October 2020) made it more difficult to search your calendar than prior versions. While in Outlook's calendar module, in the search box in the top center of the application, type category followed by a colon and the name of the category you're searching for, such as category:client. Capitalization does not matter. Additional tips for using Mac Outlook's new search box are here: <https://support.microsoft.com/en-us/office/search-in-the-new-outlook-for-mac-9c2e737e-050f-4125-addc-fa20fd03f291>.

8. CALENDAR - VIEW NON-CONTIGUOUS DAY

For Windows users: When scheduling, it can be helpful to see days that aren't contiguous side-by-side. Open your Outlook calendar. Using the month view in the upper left-hand corner, hold down the ctrl key while clicking on the days you want to view.

For Mac users: Outlook for Mac lacks this feature.

9. FAVORITING MULTIPLE INBOXES

If you manage multiple inboxes, favorite them to see both of them at the top of your folders list.

For Windows users: Start by showing your favorites: from your email, on the View ribbon, click on Folder Pane in the Layout group. If Favorites isn't checked, click on it to show your Favorites. Then, right-click on each inbox and add it to your favorites.

For Mac users: Right-click on each inbox (or folder) and select Add to Favorites." The favorites group at the top of the folder list will automatically appear after favoriting your first inbox (or folder). If you unfavorite all inboxes and folders, then the favorites group disappears automatically.

10. DRAG AND DROP

For Windows users: Quickly convert emails into calendar appointments or tasks by dragging and dropping them onto the calendar or task icon in the bottom left-hand corner.

For Mac users: In Mac Outlook, dragging and dropping for emails creates calendar appointments, but not tasks.