



Process email with the 4 D's:

For every message in your inbox, follow the 4 D's.

- Delete – If it isn't important, **delete** it immediately.
- Do – If it can be done in two minutes or less, **do** it (reply, call, file, etc.)
- Delegate – If it isn't for you, or if you can, **delegate** (forward) it.
- Defer – If you need to do it, but it takes longer than two minutes (including reading) **defer** it.

Examples:

- Flag the message for follow-up
- Categorize the message
- File the message in an action items folder.

Yearly cleanup:

Each year, it can be helpful to cleanup your folders so you are only looking at the current year's items. You can still reference past folders, but you'll be surprised at how little you do this.

- Create a folder titled the past year
- Move all existing folders into the new folder
- Set up a new folder structure
- Create new rules
- Create new categories (if needed)
- Delete large emails you no longer need
- Save emails or attachments to a network drive

Rules:

Use rules to automatically move specific emails to a folder. *Note: Rules work for emails from vendors. Do not use rules for emails that could contain tasks, important, or timely information.*

1. Right-click on an existing email you want to create rule for.
2. Choose **Rules > Create Rule**.
3. Select the conditions that need to be met.
4. Select **Move the Item to folder**, then click **Select Folder** to identify where to move the email.
5. Click **OK**.

Search Folders:

If you find yourself searching for the same type of emails often, for example, from your supervisor. You can create a search folder. Search folders allow you to set up criteria beforehand and will show all emails from your entire mailbox that match those criteria at all times. For example, the Unread Mail folder looks across your entire inbox and displays all unread messages at any given time.

1. Click on **Folder**.
2. Choose **New Search Folder**.
3. Select one of the existing types of search folders, or create a custom one.

Conditional Formatting:

This applies a different font format to specific messages. For example, you may want to call more attention to emails from your supervisor.

Note: these have to be set up per each folder.

1. Click **View > View Settings > Conditional Formatting**.
2. Click **Add**.
3. Title the Format.
4. Click **Font > Set up Font Settings > Click OK**.
5. Click **Condition > Click From and Sent To** to specify who emails are sent from (supervisor) to (you.) > Click **OK three times**.

Categories:

Categories can be used to tag email messages, tasks, and calendar items with a keyword, which can then be searched.

Create categories:

1. Click on **Home > Categorize > All Categories**.
2. Rename the existing categories or create new ones.
3. Click **OK**.

Add Categories:

1. Right-click on an email message. Choose **Categorize > Select a category**

Quick Parts:

Re-use specific text within any email message.

1. Create a new email message.
2. Paste in or type the desired text.
3. Highlight all of the text.
4. Choose **Insert > Quick Parts > Save Selection To Quick Part Gallery..**
5. Title the Quick Part and click **OK**.

Anytime you want to add that message, go to **Insert > Quick Parts > Choose a Quick Part**.

Quick Steps:

Quickly perform multiple actions with one click. For example, categorize and move an email to a folder.

Create Quick Steps:

1. Click the drop-down arrow next to Quick Steps.
2. Choose **New Quick Step > Custom**.
3. Title the Quick Step.
4. Click the drop down arrow to add an action.
5. Choose **Categorize > Select a category**.
6. Click **Add Action**.
7. Choose **Move to folder**.
8. Select a folder.

Apply Quick Steps:

1. Click on an email message.
2. Select the quick step to apply.

Email Templates:

Create templates to reuse an entire email.

Create templates:

1. Create a new message.
2. Leave spaces for things such as **time, date, and, place**.
3. Click **File > Save As > Choose Outlook Template**.
4. Browse to the desired location to save, such as a shared drive.

When you want to send the template email:

1. Browse to the saved location.
2. Double-click to open the message in Outlook.
3. Make any necessary changes and send.