



Outlook

MANAGING YOUR INBOX: TIPS AND TRICKS

Agenda ideas

Template emails – creating and recalling

Conditional Formatting – visual organization of inbox

Using Categories – organize inbox with categories and sort function

Diverting emails – remove unneeded/low priority emails for main inbox

Contact Lists – create your own

No reply all – Ignore reply all responses and delete.

Drag and drop email to calendar

Questions

Polling options

Template Emails

Create an email message template

Use email templates to send messages that include information that infrequently changes from message to message. Compose and save a message as a template, and then reuse it when you want it. New information can be added before the template is sent as an email message.

1. On the **Home** tab, in the **New** group, click **New E-mail**.

Keyboard shortcut To create an email message, press CTRL+SHIFT+M.

In the message body, enter the content that you want.

1. In the message window, click the **File** tab.
2. Click **Save As**.
3. In the **Save As** dialog box, in the **Save as type** list, click **Outlook Template**.
4. In the **File name** box, type a name for your template, and then click **Save**.

By default templates are saved in the following location:

c:\users\username\AppData\Roaming\Microsoft\Templates

Send an email message based on a template

Use email templates to send messages that include information that doesn't change from message to message. You can compose a message and save it as a template, then reuse it anytime you want it, adding new information if needed. These instructions assume you've already created and saved a message template. For instructions on creating a message template, see [Create an email message template](#).

These instructions assume you've already created a message template. To create an email message template, see [Create an email message template](#).

To use an email message template, use the following steps:

1. Select **New Items > More Items > Choose Form**.
2. In the **Choose Form** dialog box, in **Look In**, click **User Templates in File System**.
3. The default templates folder is opened. The folder location (in Windows 7 and later operating systems) is **c:\users\username\AppData\Roaming\Microsoft\Templates**. If your template is saved in a different folder, click **Browse**, and then select the template.
4. Select the template, and then click **Open**.
5. Make any additions or revisions to the recipients in the **To**, **Cc**, or **Bcc** boxes and any changes to the subject and message body.

Note: Changes made aren't saved to the template. If you use the **Save** command, this creates a draft of your message, but won't update the template. To update the template, follow the steps for saving a new template in [Create an email message template](#).

6. Click **Send**.

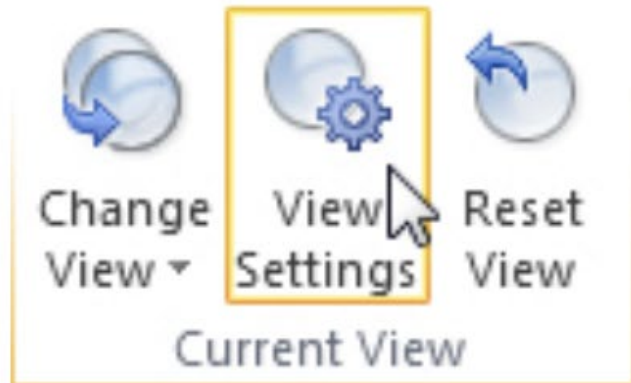
Conditional Formatting

Conditional formatting in classic Outlook for Windows allows you to automatically change incoming message colors and fonts based on sender, subject, or recipients. Conditional formatting in classic Outlook for Windows is a way to make the incoming messages that meet defined conditions stand out in the message list by using color, fonts, and styles. You specify conditions that an incoming message should meet, such as a sender's name or email address, and then conditional formatting is applied only to those messages.

For example, a conditional rule can specify that all messages sent from your manager appear in red text in the message list. If you want to make further changes to the body of your email messages, [change the default font or text color for email messages](#).

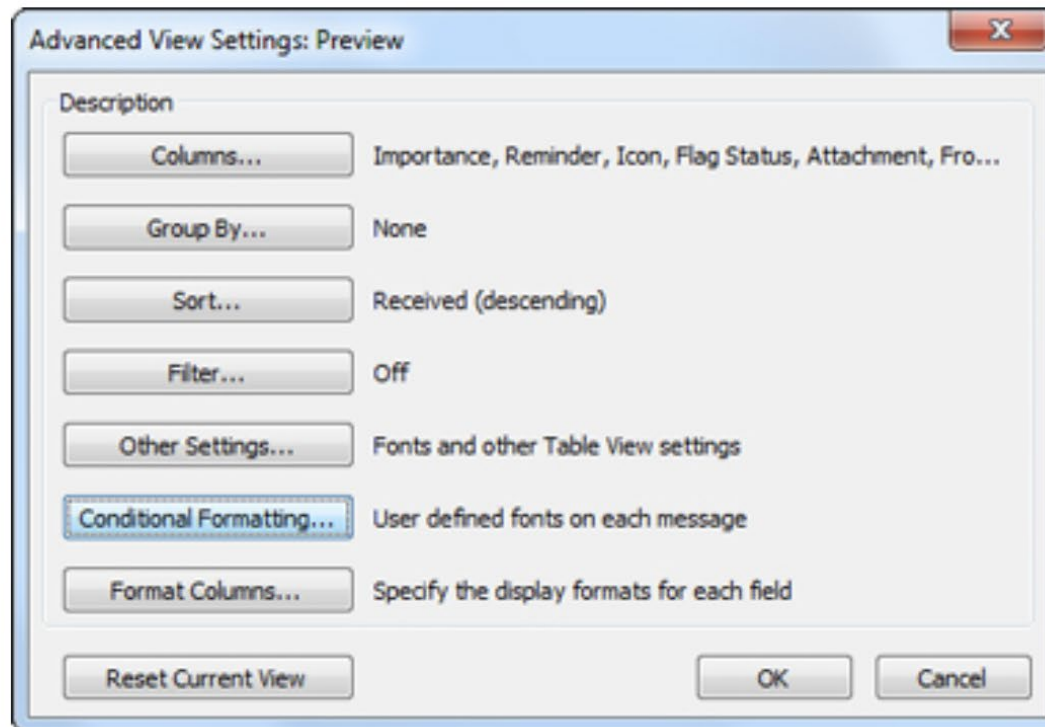
Conditional Formatting, *continued*

1. In Outlook for Windows, click **View**.
2. In the **Current View** group, click **View Settings**.



Conditional Formatting, *continued*

3. In the **Advanced View Settings** dialog box, click **Conditional Formatting**.



A set of default rules appears. This includes the **Unread messages** rule. This rule makes unread messages appear bold in the message list. In addition, any conditional formatting rules that you created in the **Organize** pane with an earlier version of Outlook appear.

Conditional Formatting, *continued*

4. Do any of the following:

- To delete a rule, click the rule, and then click **Delete**.
- To temporarily turn off a rule, clear the check box for that rule.
- To change the criteria for a rule, click the rule, and then click **Condition**.
- To change the text formatting, click the rule, and then click **Font**.
- To add a new conditional formatting rule, click **Add**, in the **Name** box, type a name, click **Font** to specify the formatting, and then click **Condition** to specify the criteria for this rule.

Conditional Formatting, *continued*

Make all messages from John Kane appear in red

1. Click **Add**.
2. Enter a name for the rule.
3. Click **Font**.
4. Under **Color**, click **Red**.
5. Click **OK**.
6. Click **Condition**.
7. In the **From** box, type John Kane.
8. In the **Filter**, **Conditional Formatting**, and **Advanced View Settings** dialog boxes, click **OK**.

Note: The name must exactly match the full name that appears on messages that you receive.

Conditional Formatting, *continued*

Make all messages that contain the word Contoso in the subject appear green

1. Click **Add**.
2. Enter a name for the rule.
3. Click **Font**.
4. Under **Color**, click **Green**.
5. Click **OK**.
6. Click **Condition**.
7. In the **Search for the word(s)** box, type Contoso.
8. In the **Filter, Conditional Formatting**, and **Advanced View Settings** dialog boxes, click **OK**.

Conditional Formatting, *continued*

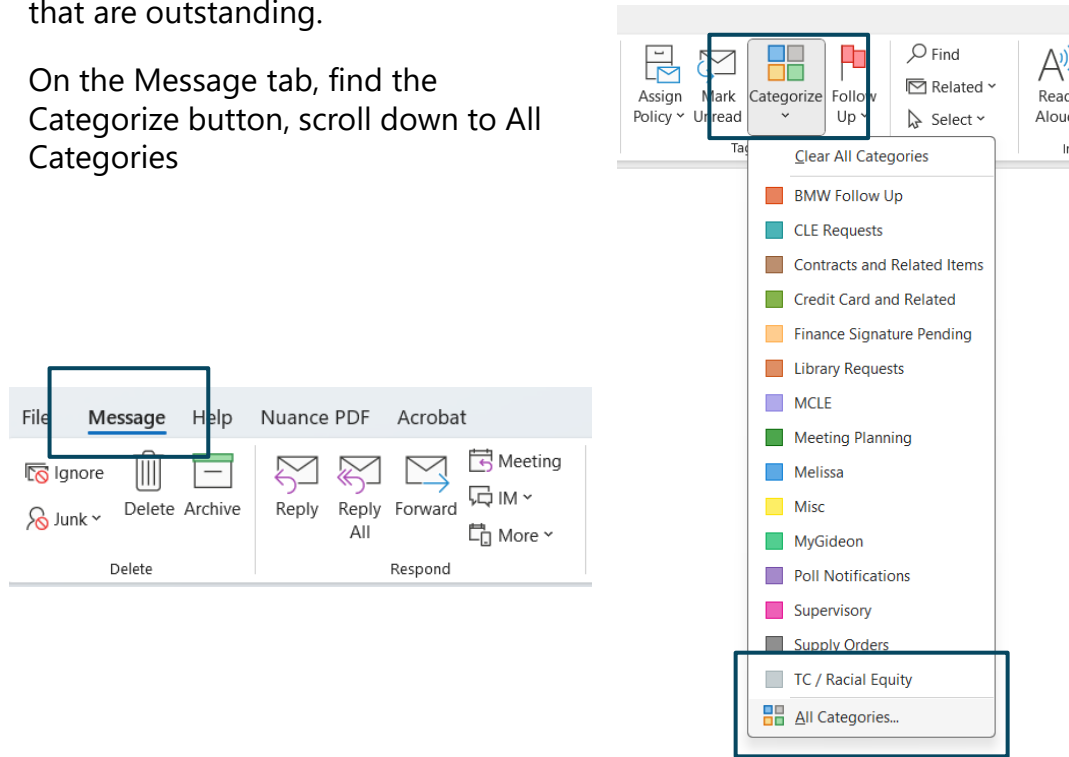
Make all messages that contain the word holiday in the subject or message body appear blue

1. Click **Add**.
2. Enter a name for the rule.
3. Click **Font**.
4. Under **Color**, click **Blue**.
5. Click **OK**.
6. Click **Condition**.
7. In the **Search for the word(s)** box, type holiday.
8. In the **Filter, Conditional Formatting**, and **Advanced View Settings** dialog boxes, click **OK**.

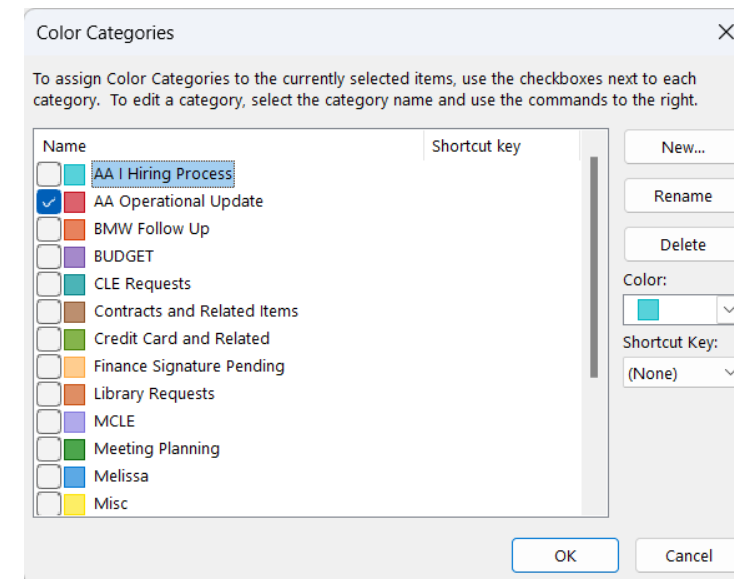
Using Categories

Categories are another way to organize your inbox. It's the system that I use, and I find it very helpful in how I manage my inbox and track items that are outstanding.

On the Message tab, find the Categorize button, scroll down to All Categories



Once in All Categories, you can change the name and color selection from the default color names.



Using Categories *continued*

To sort by Categories, go to the top of your email and select Categories (2x). The first will group all the Categories at the bottom of your email and the second will move them to the top in descending order. This will keep any email that you need to track at the top of your inbox.

All	Unread								By Date ▾ ↑
! 📧 📎 📧	From	Subject	Size	Categories	Mention	Received ▾	🔍		
▼ Today									
	Nicole Lawal	Internal Transfer Postings - Supervising Administrative Assistant III - PDD Fall River and Investigator - PDD Malden	60 ...						Tue 4/9/2024 3:43...

All	Unread								By Categories ▾ ↑
! 📧 📎 📧	From	Subject	Size	Categories ▾	Mention	Received	🔍		
▼ Supply Orders: 1 item(s)									
↶	Maudelcia Tuitt	date stamps	36 ...	Supply Orders					Tue 3/12/2024 9:1...
▼ Supervisory: 12 item(s)									
↶	Kristen Munichiello	RE: request while I am out	67 ...	Supervisory					Thu 4/4/2024 1:55...

→	Kristen Munichiello	Regarding Req #007 Amended 2	53 ...	BMW Follow Up					Fri 9/22/2023 1:28...
▼ AA Operational Update: 1 item(s)									
	Melissa Dineen	Doodle Poll for AA Operational Update	69 ...	AA Operational ...					Tue 4/2/2024 10:3...
▼ (none): 15249 item(s)									
	Nicole Lawal	Internal Transfer Postings - Supervising Administrative Assistant III - PDD Fall River and Investigator - PDD Malden	60 ...						Tue 4/9/2024 3:43...

Diverting Emails

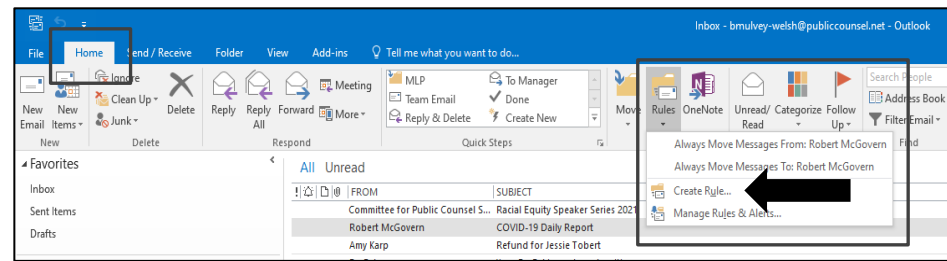
We all get email that we don't have to respond to, but we are sent as FYI mail. For example, I am the main admin on EventBrite and get a copy of every email that is sent from them. I don't need them in my inbox, so I divert them to their own folder reducing the clutter in my inbox. I'm sure everyone can identify email that falls into that category.

For demonstration purposes I used Robert McGovern's Covid update emails (which I do read and find totally necessary and not email clutter at all!)

Highlight the email

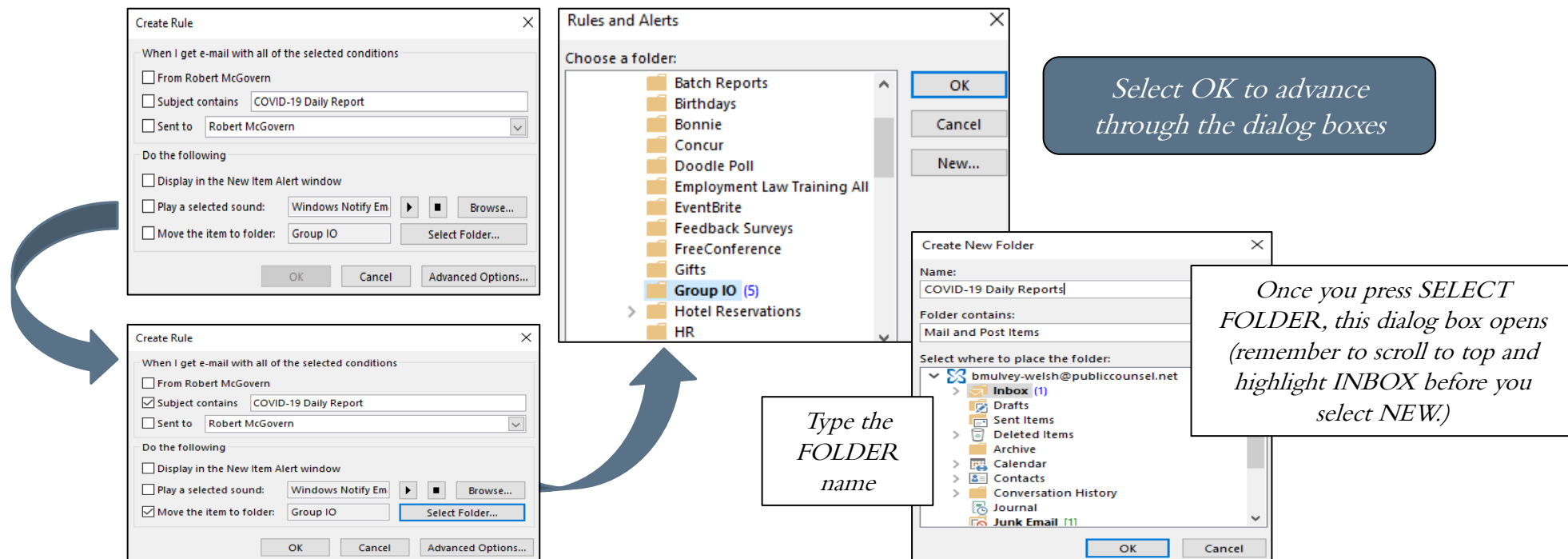
FROM	SUBJECT	RECEIVED
Committee for Public Counsel S...	Racial Equity Speaker Series 2021	Thu 4/1/2021 8:10 AM
Robert McGovern	COVID-19 Daily Report	Thu 4/1/2021 8:02 AM

On the HOME tab menu bar, select RULES, and then CREATE RULE

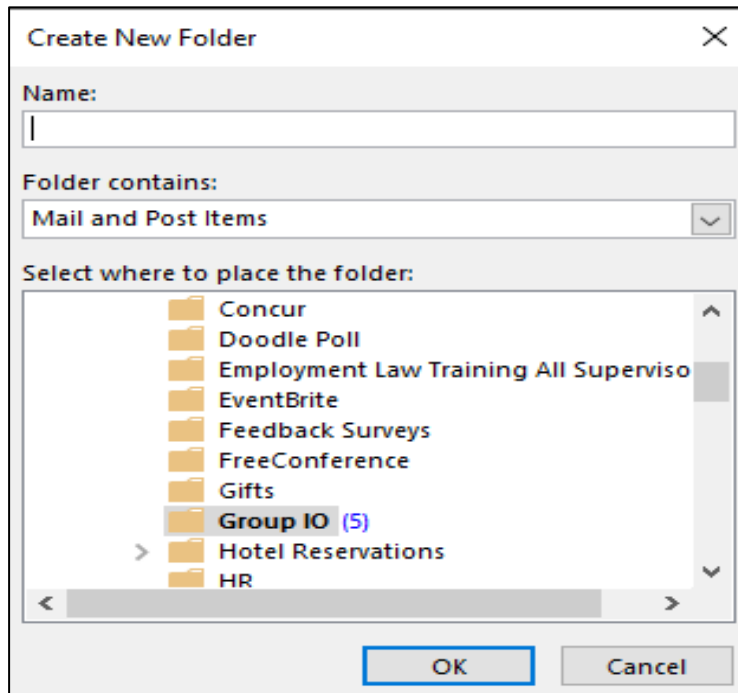


Diverting Emails *continued*

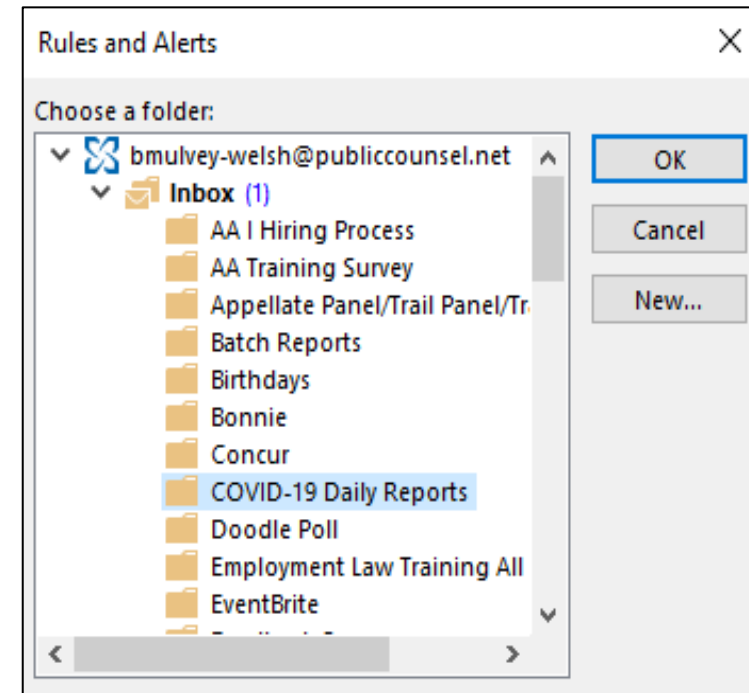
A dialog box will open to create the parameters for the rule. You have several options from which to choose. In this instance, since I want to have all the Covid-19 Daily Reports in one folder, I will select SUBJECT CONTAINS and I want to move it to its own folder; I will select MOVE THE ITEM TO FOLDER. Outlook allows you to select the folder using SELECT FOLDER. If the folder doesn't exist, you can create it at this step. Make sure to scroll to the top so that INBOX is selected, or your folder will be created as a subfolder under whichever is selected.



Diverting Emails *continued*



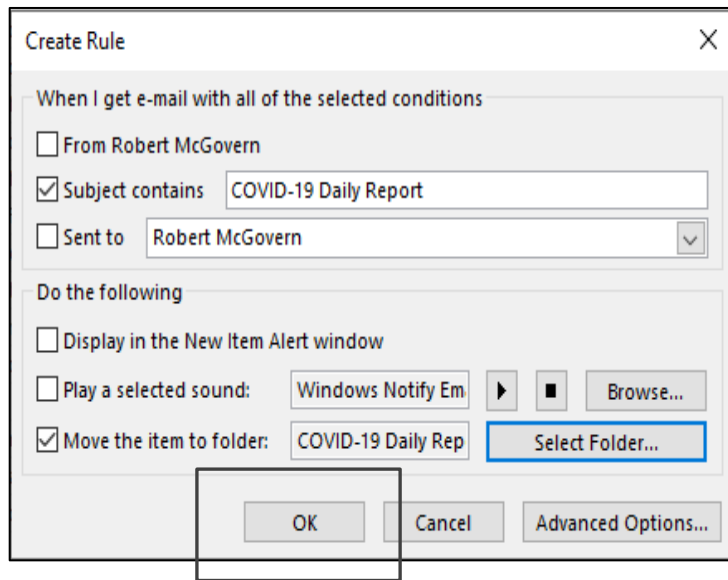
Type the folder NAME. You will not need to make any other options in this dialog box.



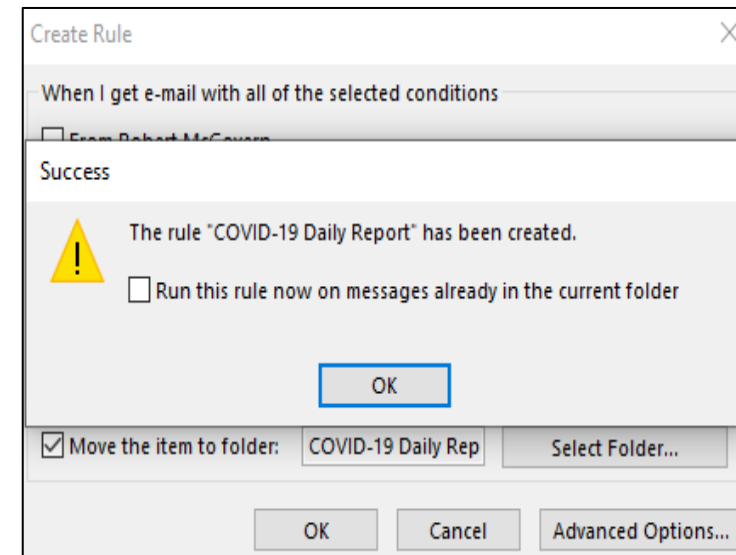
When you select OK, a dialog box will show the new folder and the location in your folder menu.

Diverting Emails *continued*

At this point, Outlook will appear to be going backwards through the dialog boxes. This is normal. You will need to select OK in each of the dialog boxes that will open.

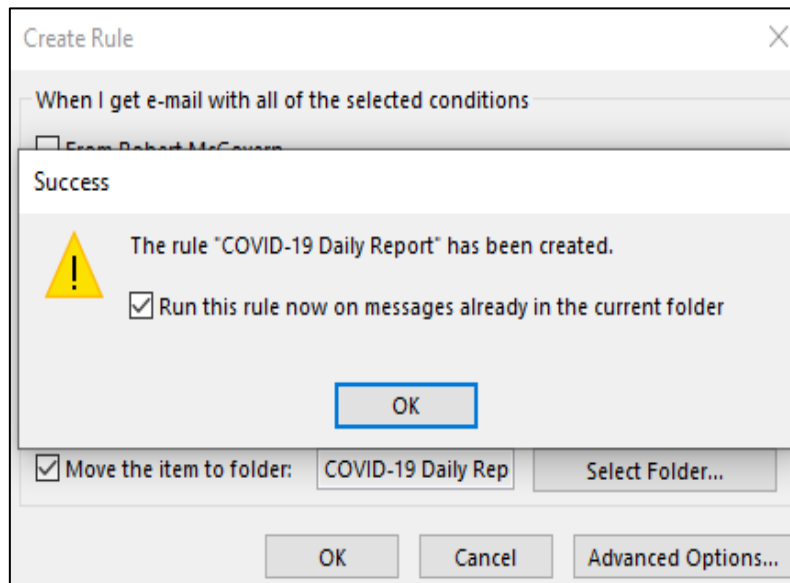


Select OK

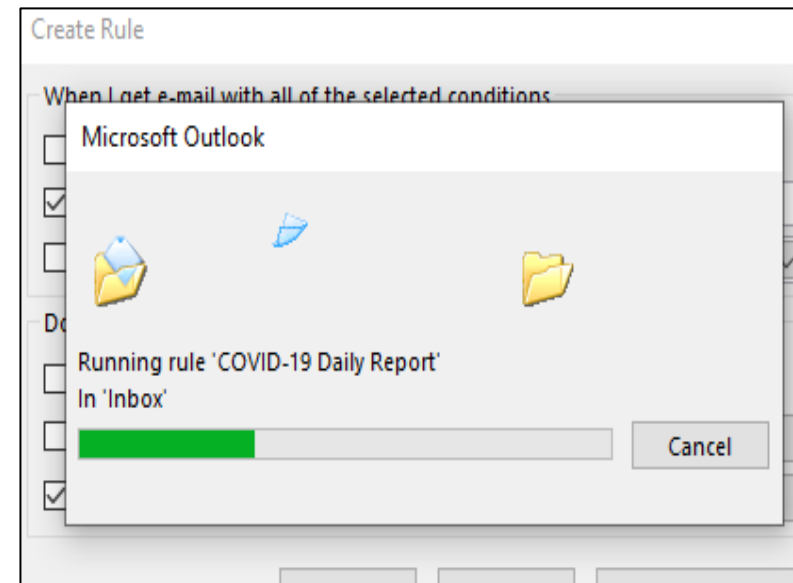


Dialog box showing rule has been created.

Diverting Emails *continued*



Check the box if you want Outlook to find all the emails like the one you are creating in the rule and put them all in the correct folder.



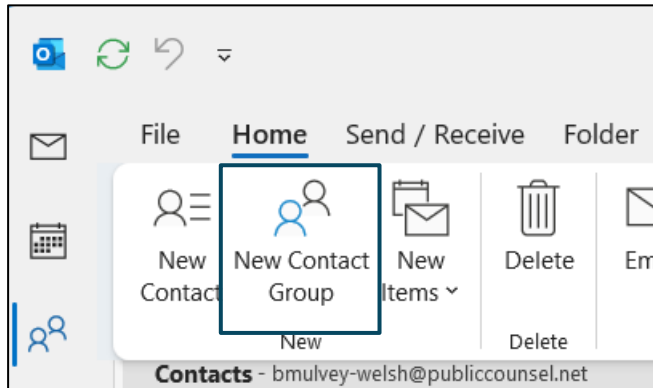
Outlook moving all the emails to the selected folder.

Diverting Emails *continued*

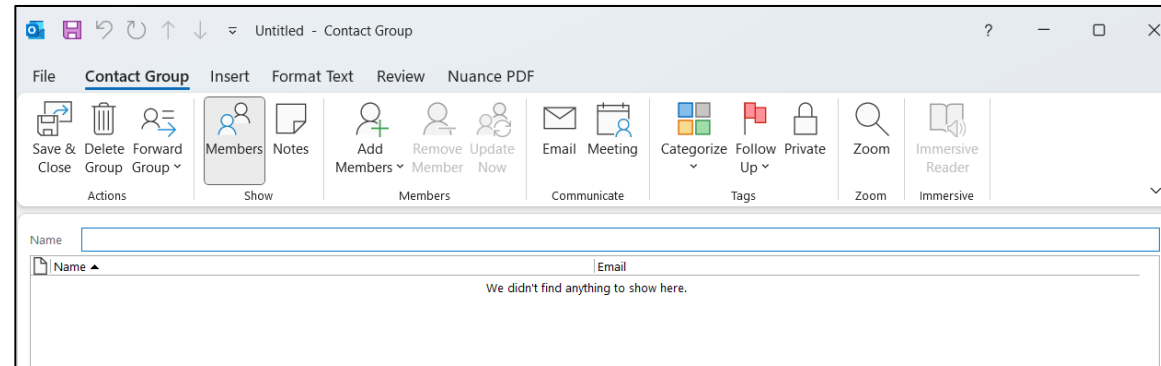
All Unread		Search COVID-19 Daily Reports (Ctrl+E)		
FROM	SUBJECT	RECEIVED	SIZE	CATEGORIES
Date: Today				
Robert McGovern	COVID-19 Daily Report	Thu 4/1/2021 8:02 AM	51 KB	
Date: Yesterday				
Robert McGovern	COVID-19 Daily Report	Wed 3/31/2021 8:11 AM	55 KB	
Date: Tuesday				
Robert McGovern	COVID-19 Daily Report	Tue 3/30/2021 8:06 AM	51 KB	
Date: Monday				
Robert McGovern	COVID-19 Daily Report	Mon 3/29/2021 8:02 AM	56 KB	
Date: Last Week				
Robert McGovern	COVID-19 Daily Report	Fri 3/26/2021 8:12 AM	57 KB	
Robert McGovern	COVID-19 Daily Report	Thu 3/25/2021 8:17 AM	51 KB	
Robert McGovern	COVID-19 Daily Report	Wed 3/24/2021 7:59 AM	54 KB	
Robert McGovern	COVID-19 Daily Report	Tue 3/23/2021 8:03 AM	55 KB	
Robert McGovern	COVID-19 Daily Report	Mon 3/22/2021 7:58 AM	53 KB	
Date: Two Weeks Ago				
Robert McGovern	COVID-19 Daily Report	Fri 3/19/2021 7:57 AM	54 KB	
Robert McGovern	COVID-19 Daily Report	Thu 3/18/2021 8:02 AM	54 KB	
Robert McGovern	COVID-19 Daily Report	Wed 3/17/2021 8:16 AM	50 KB	
Robert McGovern	COVID-19 Daily Report	Tue 3/16/2021 8:05 AM	59 KB	
Robert McGovern	COVID-19 Daily Report	Mon 3/15/2021 8:08 AM	53 KB	
Date: Three Weeks Ago				
Robert McGovern	COVID-19 Daily Report	Fri 3/12/2021 8:11 AM	60 KB	
Robert McGovern	COVID-19 Daily Report	Thu 3/11/2021 8:02 AM	56 KB	
Robert McGovern	COVID-19 Daily Report	Wed 3/10/2021 7:56 AM	57 KB	
Robert McGovern	COVID-19 Daily Report	Tue 3/9/2021 8:00 AM	57 KB	
Robert McGovern	COVID-19 Daily Report	Mon 3/8/2021 8:06 AM	53 KB	
Date: Last Month				
Robert McGovern	COVID-19 Daily Report	Fri 3/5/2021 8:05 AM	56 KB	
Robert McGovern	COVID-19 Daily Report	Thu 3/4/2021 7:53 AM	56 KB	
Robert McGovern	COVID-19 Daily Report	Wed 3/3/2021 8:08 AM	56 KB	

Contact Lists

From Outlook, select the Contact icon.

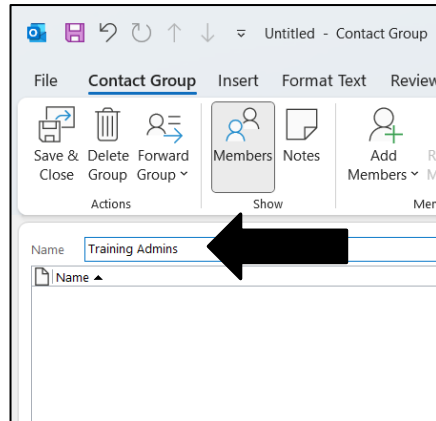


From the HOME menu, select New Contact Group.

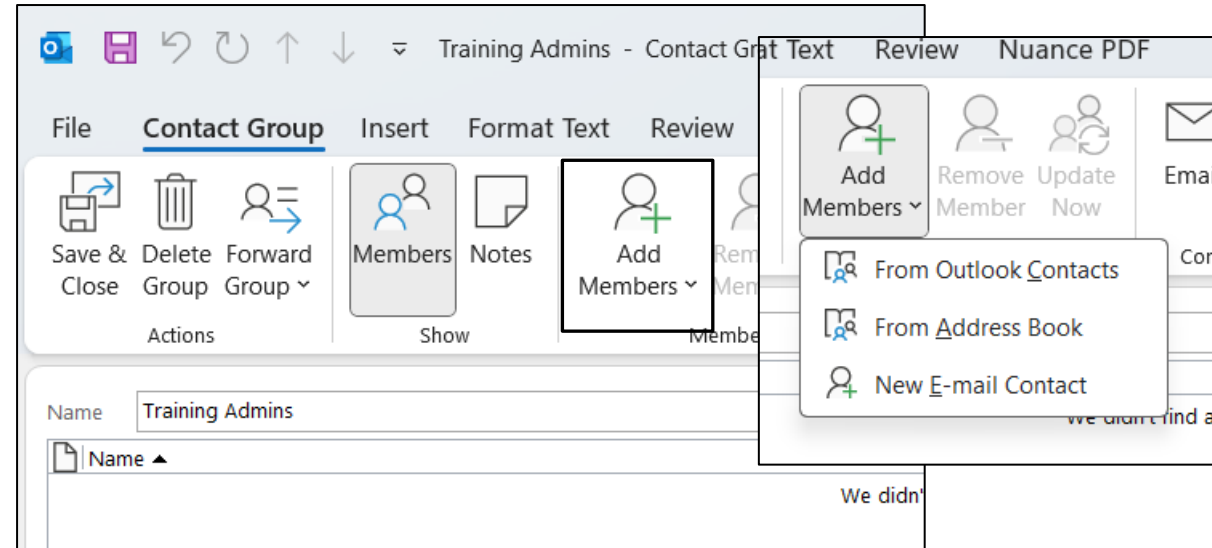


An empty group box will open.

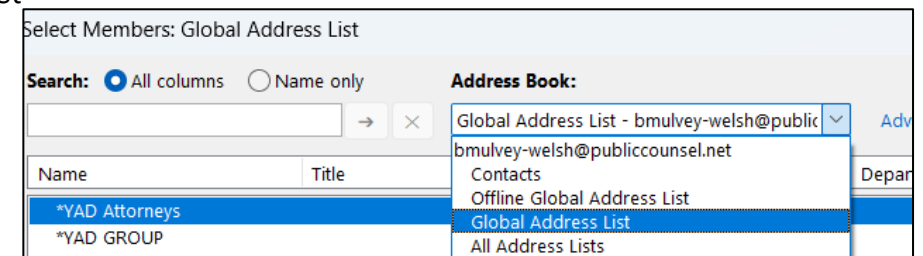
Contact Lists *continued*



Enter a name for the group.



Select Add Members. From the menu, select from Address Book. From pulldown, select Global Address list



Contact Lists *continued*

In the Search bar, start typing the name you'd like to add.

Search: ☒ All columns ☐ Name only

Search bar: jac

Name	Title
*YAD Attorneys	
*YAD GROUP	
+CAFL Attorneys	
1400 Hours	
2017 Training Registration	
2018 Training Program App...	
2022summerinterns	
221 Main St. Brockton	
278Amotions@publiccou...	
2miqua@gmail.com	

Select the name you'd like to add from the list.

Search: ☒ All columns ☐ Name only

Search bar: jac

Name	Title
Ami Jackson	Investigator
Corey Jacobson	
Daron Jacobs	Sr Web Applica
Haylie Jacobson	Appeals Attorn
Jack Weydt	Director of App
Jacob Hayward	Trial Attorney
Jacob Maddox	Trial Attorney
Jacob Steinmann	Trial Attorney
Jacqueline Baker	
Jacqueline Dutton	Attorney In Cha
Jacqueline Stimpson	
Jacquelyn Diaz	Admin Assistan
Jacquelyn O'Brien	Managing Dire
Jacquelyn Oppler	Social Services
Jacquelyn Kantack	Intern

Members: Jacquelyn Diaz

Keep adding names until your list is complete

Select Members: Search Results - Global Address List

Search: ☒ All columns ☐ Name only

Address Book: Search Results - Global Address List

Search bar: levi

Name	Title	Business Phone	Location
Aaron Levin			
Elizabeth Levitan	Staff Counsel I	617-516-5812	Roxbury - 7 Palme...
Levi Phillips	Admin Assistant III	617-910-5817	Boston - 75 Feder...
Marcy Levington	Trial Attorney	508-815-5305	Hyannis - 973 Iyan...
Patrick Levin	Appeals Attorney	617-910-5729	Boston - 75 Feder...

Members: Jacquelyn Diaz; Kristen Munichiello; Levi Phillips

Here is what the list will look like. From here, you can add/delete emails by selecting the appropriate button.

Training Admins - Contact Group

File Contact Group Insert Format Text Review Nuance PDF

Save & Close Delete Forward Group Members Notes Add Members Remove Member Update Now Email Meeting Categorize Follow Up Private Zoom Immersive Reader

Name: Training Admins

Name	Email
Jacquelyn Diaz	jdiaz@publiccounsel.net
Kristen Munichiello	kmunichiello@publiccounsel.net
Levi Phillips	lphillips@publiccounsel.net

Make sure you click the Members button to add the name to your list.

Contact Lists *continued*

To recall your list, simply type the name of your group in the TO field of your email.

The image displays two email composition forms. The top form shows a 'Send' button with a paper plane icon, a 'From' dropdown menu set to 'bmulvey-welsh@publiccounsel.net', and 'To', 'Cc', and 'Bcc' fields. The 'To' field contains the text '⊕ Training Admins;'. The bottom form is a zoomed-in view of the same interface, showing the 'To' field with three entries: a red dot followed by 'Jacquelyn Diaz', a light blue dot followed by 'Kristen Munichiello', and a red dot followed by 'Levi Phillips'. All names are underlined. The 'From' dropdown remains the same, and the 'Cc' and 'Bcc' fields are empty.

Field	Value
From	bmulvey-welsh@publiccounsel.net
To	⊕ Training Admins;
Cc	
Bcc	
Subject	

Field	Value
From	bmulvey-welsh@publiccounsel.net
To	● Jacquelyn Diaz; ○ Kristen Munichiello; ● Levi Phillips
Cc	
Bcc	
Subject	

Ignoring “Reply All” on emails you receive

If your inbox is cluttered with conversations or email threads you don't need to be part of, use **Ignore** to delete the emails. And any future emails on the subject will automatically be deleted.

1. Select the conversation or an email in the thread.
2. Select the arrow by **Delete > Ignore**.
3. If prompted, confirm by selecting **Ignore Conversation**.

Note: The **Ignore Conversation** command in step 3 appears in the **Ignore Conversation** dialog box. This dialog box doesn't appear if you previously selected the **Don't show this message again** check box.

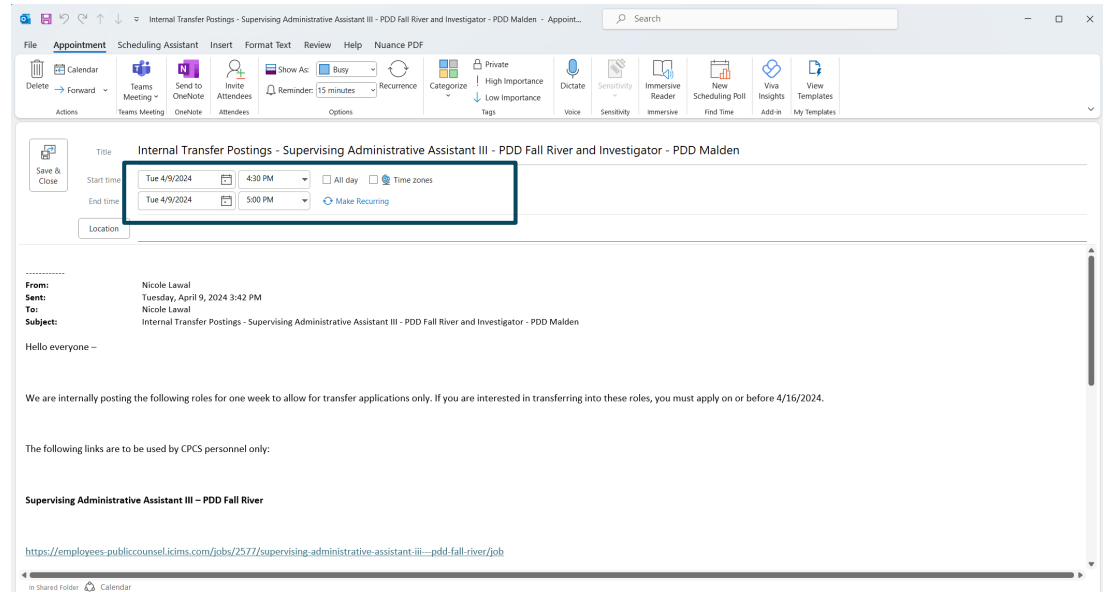
Email to Outlook Event

Do you get emails that have action item dates that you don't want to forget? You can easily create Outlook events/meetings by dragging and dropping to your calendar.



Select the email you want to use and drag it to the calendar icon in your Outlook.

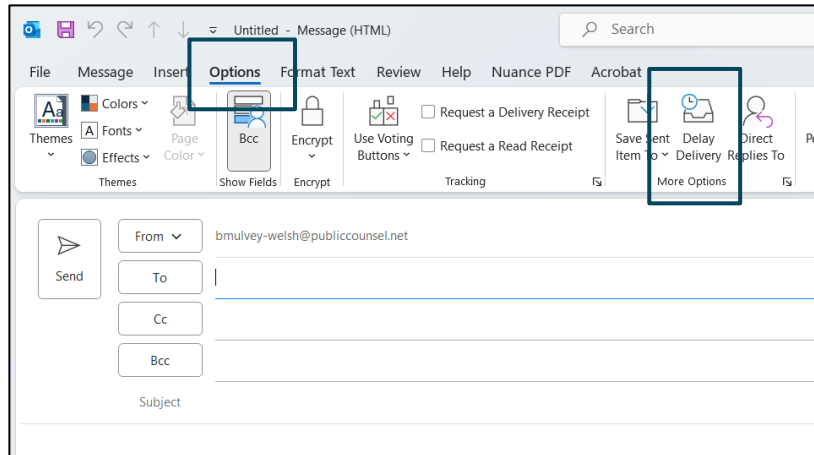
Change the start and end time to the dates/times you want and hit Save & Close. It will update to your outlook calendar.



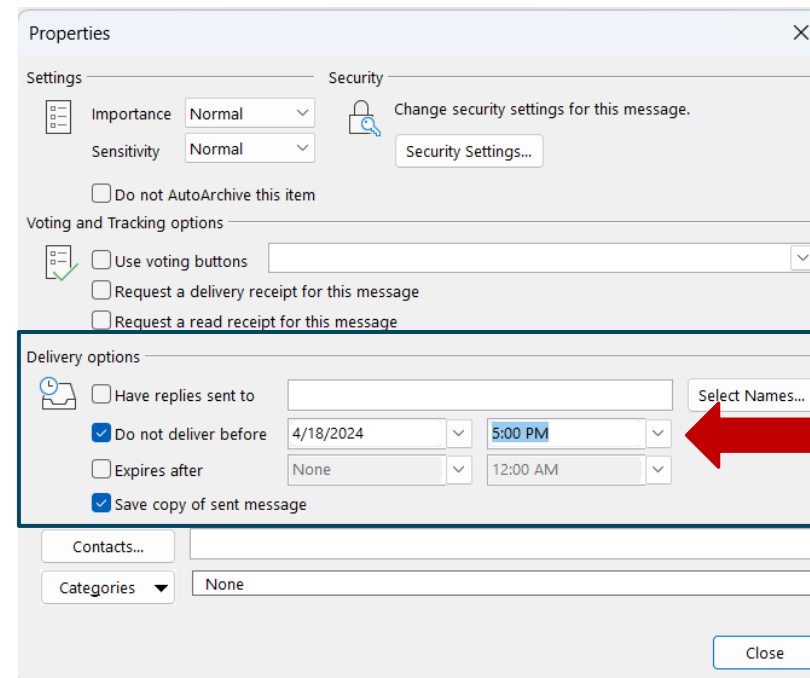
The screenshot shows the Outlook 'Appointment' window for the email 'Internal Transfer Postings - Supervising Administrative Assistant III - PDD Fall River and Investigator - PDD Malden'. The event title is the same. The start time is set to 'Tue 4/9/2024 4:30 PM' and the end time is 'Tue 4/9/2024 5:00 PM'. The 'Save & Close' button is highlighted. The email content is visible in the background, showing the sender 'Nicole Lawal' and the subject 'Internal Transfer Postings - Supervising Administrative Assistant III - PDD Fall River and Investigator - PDD Malden'.

Delay Sending Email

In a new email window, select Options then Delay Delivery

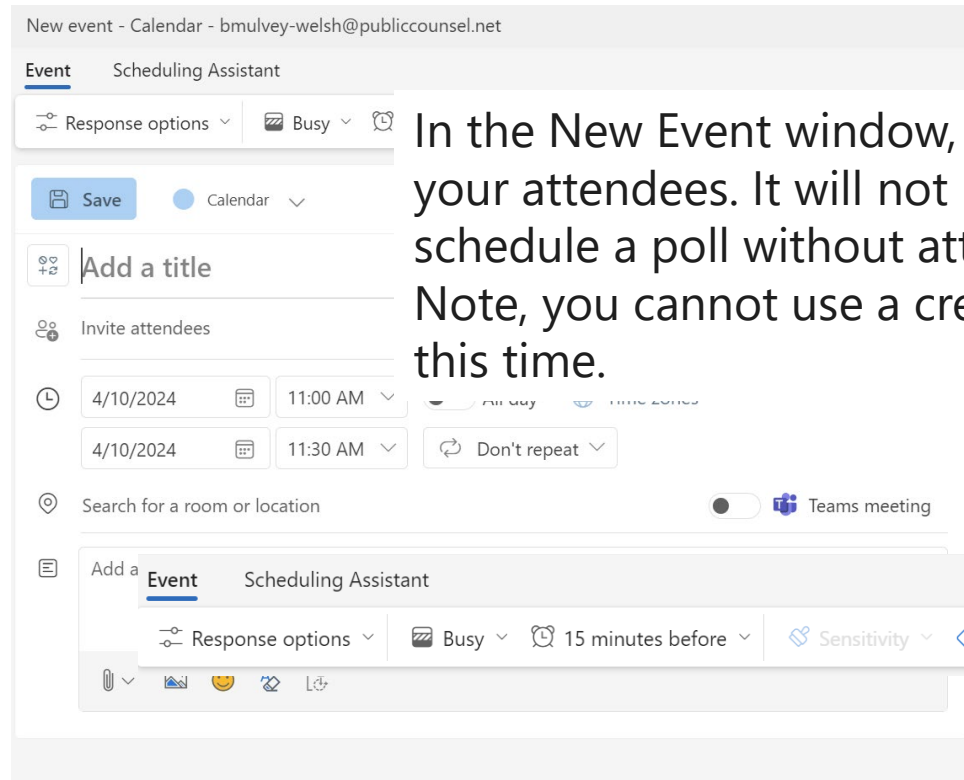
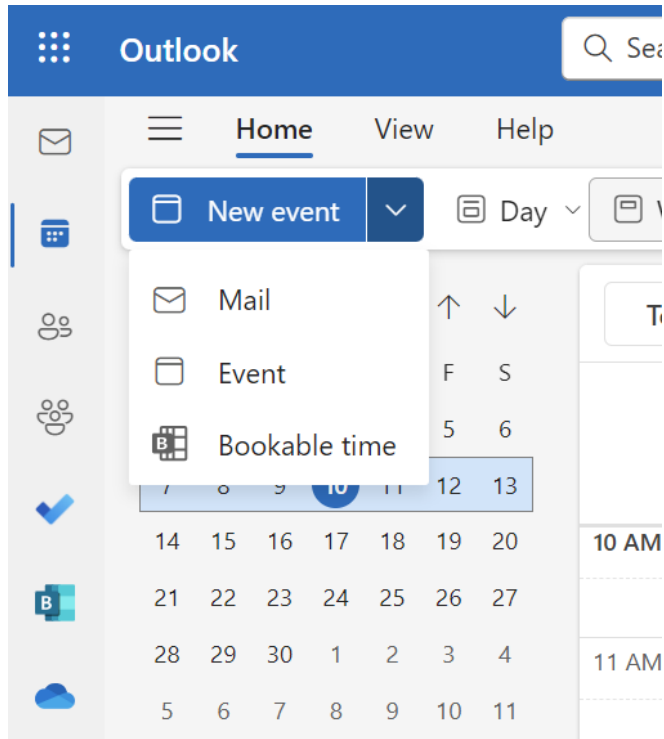


Select the properties for the delay under Delivery options. Remember to change the time as it defaults to the end of the day!



Polling

To use the polling option in MS Office, you need to access your office 365 account online. Once you do that, select your calendar. Under New Event, select Event.



In the New Event window, you will put in your attendees. It will not let you schedule a poll without attendees listed. Note, you cannot use a created list at this time.

Select Scheduling poll

Polling

 Scheduling poll

[View all your polls](#)

Time zone

(UTC-05:00) Eastern Time (US & Ca... ▾)

Duration

03:00 ▾ Meeting hours ☐

Date ⓘ < ☐ >

4/10/2024 ☐

Sort by Availability ▾

☐	05:00 PM		☐
☐	05:30 PM		☐
☐	06:00 PM		☐
☐	06:30 PM		☐
☐	07:00 PM		☐

Make changes in the Scheduling poll window for duration and date.

Sort by defaults to Availability but you'll want to change it to Time, so it shows all the times for the day and not just when someone is available.

Sort by Availability ▾

Availability

Time

You have to add all the dates/times from this screen! You just keep changing the date at the top of the screen and selecting times for each date.

Polling

Scheduling poll

11:30 AM

12:00 PM

12:30 PM

01:00 PM

01:30 PM

02:00 PM

03:00 PM

03:30 PM

04:00 PM

04:30 PM

05:00 PM

2 times selected

Next

At the bottom of the Scheduling poll pop-out, it will show how many times have been selected. Once you are satisfied, select Next.

Once you select Next, a summary screen will show up. You can go back to fix items or select Create Poll.

Attendees will be notified via email.

Scheduling poll

Selected times

Tuesday, April 30

11:00 AM

3:00 PM

Location

Please enter a location.

Teams meeting

> Manage poll settings

← Back

Create poll

Polling

You will be notified via email once someone responds to the poll. The email will show the poll name in the subject line, who responded, and what their responses are.

You can select View poll from any response email, and it will take you to the poll.

AA Operational Update



Barbara Mulvey-Welsh
To Barbara Mulvey-Welsh

Poll Notifications

[If there are problems with how this message is displayed, click here to view it in a web browser.](#)

Hi,

Your poll has a new vote from ecollins@publiccounsel.net



Scheduling poll

AA Operational Update



(UTC-05:00) Eastern Time (US & Canada)



3 hours



2 votes of 13

[View poll](#)

[View all your polls](#)

Wednesday, May 22

10:00 AM

[Send](#)

♥ Prefer: 0 ✓ Yes: 2 ✗ No: 0

Barbara Mulvey-Welsh Required ✓ Yes

ecollins@publiccounsel.net Required ✓ Yes

Thursday, May 23

10:00 AM

[Send](#)

♥ Prefer: 0 ✓ Yes: 2 ✗ No: 0

Polling

You can send a reminder to participants that have not yet responded by selecting Send reminder.

NEW DATES/TIMES AA Operational Update

🕒 3 hours duration

📍 No location provided

📅 8 options provided

🌐 (UTC-05:00) Eastern Time (US & Canada) ▾

Send reminder

Cancel poll

You can add additional dates/times if needed by scrolling to the bottom of the poll and selecting:

+ Propose another time

Polling

You can add/remove participants by using the list on the right side of the screen and selecting Add required attendee.

Organizer

You (Barbara Mulvey-Welsh)

Required Attendees

 Melissa Dineen

 Holly Smith

 Bob Vient

 Delfina Hite

 AJ Peters

 Stan Jones

 Lorraine Altmeyer

 China Duval

 Eric Collins

 Danielle Wong

 Gina Annunziata

 Gisel Pimentel

[+ Add required attendee](#)

Polling

Once a date/time is agreed upon, you can schedule the meeting by selecting the Schedule meeting option next to the date/time.

Wednesday, June 12, 2024

10:00 AM
Tentative

Prefer	Yes	No
No votes	6 votes	5 votes

AJ Peters Bob Vie... China D... Danielle... Delfina ... Eric Coll... Gina An... Gisel Pi... Holly S... Lorrain... Melissa ... Stan Jo...

×	×	×	✓	×	✓	✓	×	✓	✓	?	?
---	---	---	---	---	---	---	---	---	---	---	---

Schedule meeting

1:00 PM
Tentative

Prefer	Yes	No
No votes	8 votes	3 votes

×	×	✓	✓	✓	✓	×	✓	✓	✓	?	?
---	---	---	---	---	---	---	---	---	---	---	---

Schedule meeting

Questions

