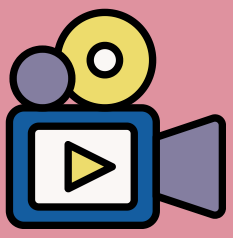
QUICK STEPS AND RULES

STREAMLINE YOUR OUTLOOK INBOX

BLUE BUTTERFLY SOLUTIONS:
TAMMY SCHAEFER



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STEP BY STEP GUIDE TO USING QUICK STEPS AND RULES IN OUTLOOK

Strategies for an Efficient and Organized Inbox

- **Combine Quick Steps and Rules:** Use **Quick Steps** for on-the-fly **sorting** and **Rules** for **automated** organization.
- **Review Folders Regularly:** Set aside time to go through your “Read Later” and “Action” folders to stay on top of tasks.
- **Refine Rules:** Adjust your R**ules** over time to ensure they capture all relevant emails without missing anything important.

Here’s steps for applying these strategies:

1. Organize Low Priority Emails With Quick Steps

- **Create a Read Later Folder:**
  - Set up a dedicated folder in your email for important things you want to read later.

- **Add a Quick Step:**
  - Go to the "Quick Steps" section and click "New Quick Step."
  - Name it "Read Later."
  - Choose the action "Move to Folder" and select your “Read Later folder”.

- **Use the Quick Step:**
  - When a newsletter or other important reference material arrives, select the email and click the "Read Later" Quick Step.
  - The email will move directly into the “Read Later” folder for later reading.

Best For: Quickly clearing newsletters from your inbox while keeping them accessible. You can also follow these steps and create an “Action” Folder for important client emails that need action, so they don’t get lost in the shuffle.

2. Automate With Rules

- **Create a Rule for Specific Senders:**
  - Select a message from the sender whose emails you want to organize.
  - Click the three-dot menu and choose "Create Rule."
  - Set the rule to move all emails from that sender to a specific folder (e.g., Newsletters or Archive)

- **Customize Rules for Email Content:**
  - Go to "More Options" when creating a rule.
  - Specify criteria like keywords in the subject or body (e.g., "Newsletter", "Reports", “Attachments”, etc.).
  - Set the rule to move emails matching these criteria to the appropriate folder.

- **Test the Rule:**
  - Ensure that emails meeting your criteria are automatically routed to the chosen folder.

Best For: Automating the sorting of recurring emails based on sender or content.

Want Help With Your Email?

Schedule A Chat With Me