

Outlook Email Tips Training Flyer

As a company we use email throughout each day to communicate, share information, ask something of someone and more. It can be a very effective way to communicate. This flyer is intended to cover some of the benefits of email and some tips to help us become better at it.



Email v Phone:

Although there are times when a phone call is needed and can be more personal, email has some advantages over the phone in most situations. Below are just a few of these:

- Saving the entire history of the conversation in the email thread,
- Reach many people at the same time,
- There is no missed call “Tag you’re it” back and forth,
- Quicker in some cases than a phone call,
- Emails are more direct and require more information. Where a person might call you and leave a voicemail saying, “Hey it’s me call me back.” It is unlikely someone would email you and say “Hey, It’s me email me back.”

To, Carbon Copy, and Blind Carbon Copy:

How we enter the recipients into the To: and CC: section of an email can suggest what we are intending to happen with the email. This can vary depending on whether or not the email is purely informational or if the email is asking for some action to be taken.

If an email is informational only, the To and CC sections are basically the same. If an email is asking for some action to be taken you should only include the person you are asking to take the action in the To: section. If you are asking multiple people to each take an action, they should all be in the To: section. In an email asking for an action to be taken you may want to include some people just to keep them updated on the subject of the email. Those people should be entered into the CC section of the email.

All recipients in both the To and CC sections can see all other recipients in both sections. If you were wanting to send an email to a group of people but keep all recipients emails from being seen you can use the BCC section of an email. The BCC section is great if you are emailing a list of different customers but don’t want each customer seeing everyone on the email.

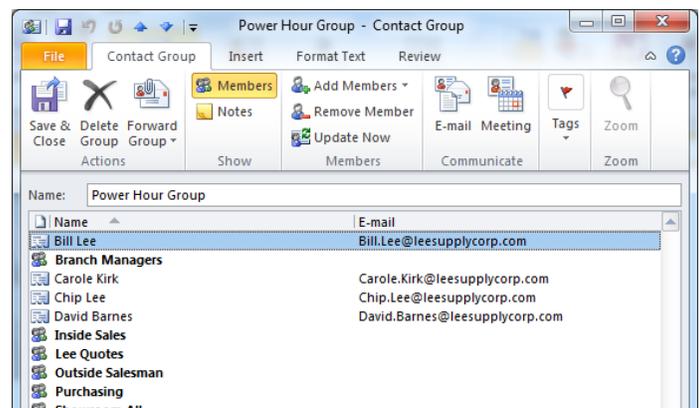
Contact Groups in Outlook:

One feature that can be used to help organize contacts is the Group feature. For example you could create a group for your customer list, your team, Manufacturer contacts and more. In these instances you can email everyone on the list by entering one recipient on the email. A person can be in multiple groups. We do this for some groups at the company level but you can create your own specific groups.

Below are the steps to create a Group. It may vary a little depending on the version you are using but should be similar.

1. Go to the Contacts or People Screen in Outlook
2. Click “New Contact Group”
3. Click “Add Members”
4. Select “From Address Book”
5. Title the group and select your recipients
6. Hit Save and Close.

You can now enter that group as a contact in an email. They will not see the group you used but it saves time when emailing a list of people. Groups can be edited in your contacts section.



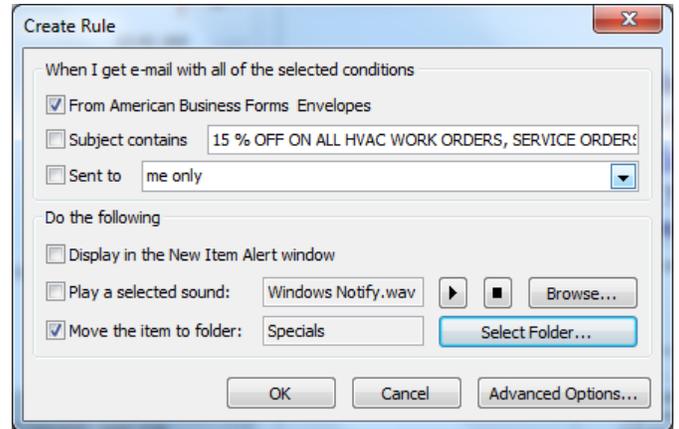
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Create a Rule:

Outlook can be set to do many different things with an email without you having to look through each one. Using rules can help you manage your inbox better. It can do things like forward an email to a person or group when it is from a certain person, flag an email as highly important if it is from someone, have an email immediately copied to a certain folder when it comes from a specific person and many more. Below is an example creating a rule that moves an email from a particular address to a folder.

1. Click on an email from the sender
2. From your inbox click Rules and then Create Rule
3. Click From (Person's email)
4. Click Move the item to folder
5. Select Folder
6. Click Ok.

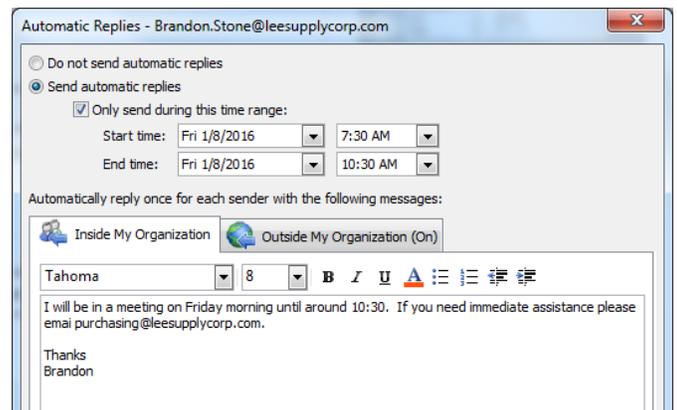
This rule will now move all emails from American Business Forms to the "Specials" folder. Rules can do much more than what is on the picture to the right. If you click advanced options you can see all of them. For another example on Rules see the end of the flyer.



Away Notifications:

When we are out of the office it is important we set away notifications so anyone that emails us is made aware. If this is not done someone can email you and be waiting on something while you are not there. The away message should include who to contact if it is urgent, when you will be out, and when you will be returning. Below is how to set an away message.

1. Click "File" in the top right of Outlook
2. Click Automatic Replies
3. Click Only Send During This Time Range
4. Click "Send Automatic Replies" and select the time range you will be out of the office
5. Enter your away message
6. Click the "Outside My Organization" Tab
7. Re-enter the message there
8. Click Ok

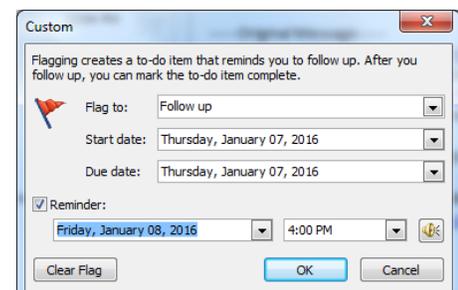


Flagging Emails:

One helpful feature for identifying high priority emails is flagging them. This puts a red flag beside the email in your inbox. Once the email has been handled you can un-flag it. You can also set a reminder to remind you in a couple days or hours to deal with the email if you have not already un-flagged it. Below is how to flag an email.

1. Select the email you want to flag in your inbox. (You do not have to open the email. Just click it once.)
2. Click the "Follow Up" flag at the top right of Outlook
3. Click Add Reminder
4. Select your Due Date and click "Reminder" and set your reminder day
5. Click Ok

This will Flag the email and set the reminder.



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Next Steps and a Couple Questions:

There are many helpful features in Outlook that are not covered in this flyer. The first next step is to learn more. Below is a link to a video on setting rules in Outlook.

<https://www.youtube.com/watch?v=esL3e3AGuaM>

TRUE or FALSE: Flagging emails can have reminders set to remind you of it in the future.

TRUE or FALSE: You can use a rule to flag emails from a specific person as important.