

Outlook Quick Steps

Email Management



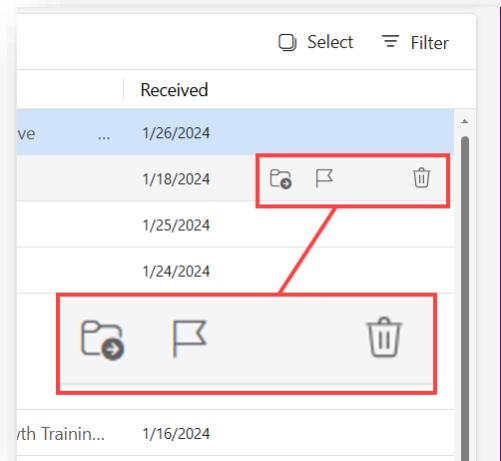
Webinar Companion Handout

Quick Actions

You can use Quick Actions in Outlook to make simple changes to your message.

With the click of the mouse, you can:

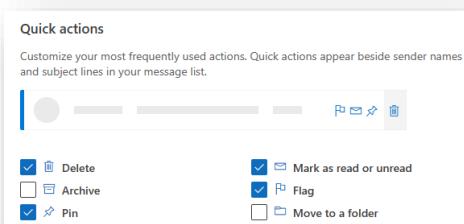
- Delete
- Archive
- Pin (not available in Classic Outlook)
- Mark as Read/Unread
- Flag
- Move to a Folder



You can take other quick actions by using the context menu, to create a task, categorize, or snooze your message.

Updating Quick Actions

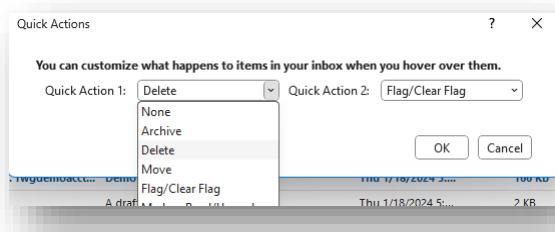
If you would like to change the options, take the following steps.



1. Go to **Settings**.
2. Go to **Mail**.
3. Go to **Customize Actions**.
4. Modify your options.
5. Click **Save**.
6. Close **Settings**.

In **Classic Outlook**, follow these steps:

1. Hover and right click to see the context menu.
2. Select **Set Quick Actions....**
3. In the **Quick Actions** dialog box that appears, choose the two Quick Actions you would like to use.



Delete is always present in Classic Outlook.

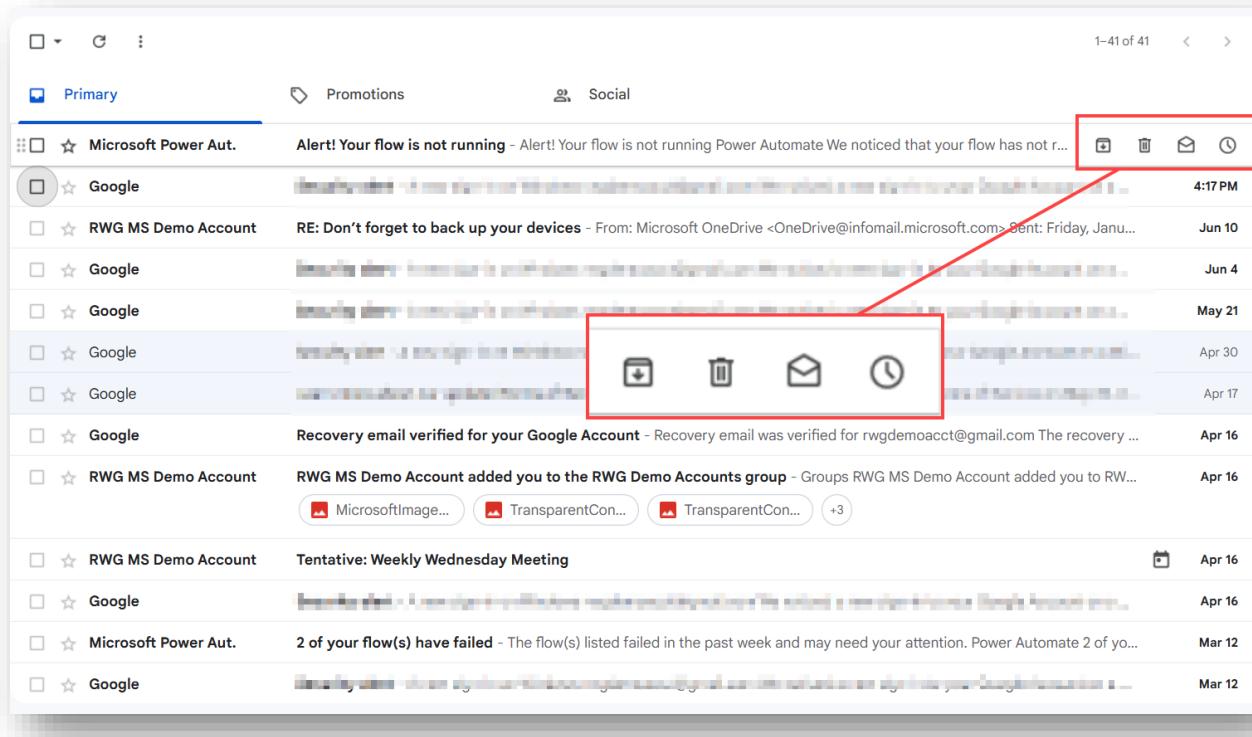
Hover Actions in Gmail

You can access similar functionality in Gmail by using Hover Action.

You have these options:

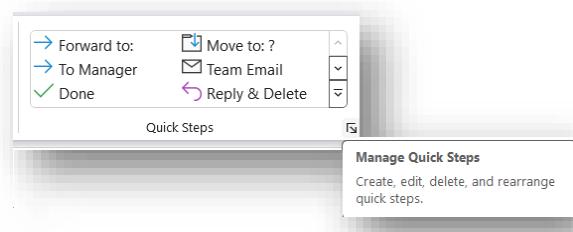
- Archive
- Delete
- Mark as Read/Unread
- Snooze

Turn off Hover Actions by going to **General** tab in **Settings**. Unlike in Outlook, you are not able to modify your options.



Quick Steps

Quick Steps automate common tasks by letting you apply multiple actions at the same time to an email message.



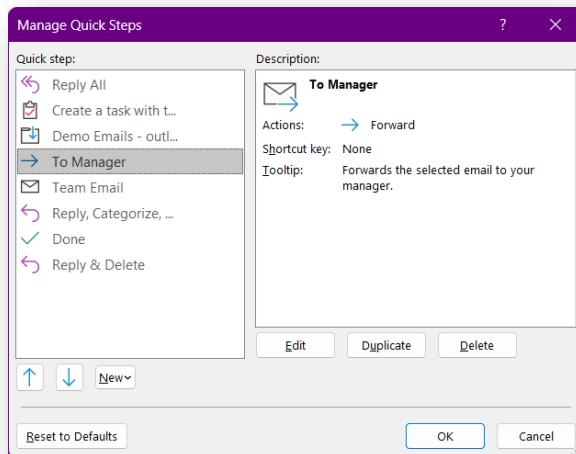
Classic Outlook

You can use Quick steps when you would like to execute several steps at once or you want to apply a greater level of customization to single step actions you take frequently.

Classic Outlook has several default Quick Steps that you can customize, or you can create a custom Quick Step.

Here is a list of the default Quick Steps:

- **Move to:** Allows you to move the selected message to a mail folder that you specify and mark the message as read.
- **To Manager:** Allows you to forward a message to your manager.
- **Team Email:** Allows you to forward the message to others in your team.
- **Done:** Allows you to move the message to a folder, marking it as complete and read.
- **Reply & Delete:** Allows you to open a reply to the selected message, and then delete the original message.



To modify a default or any existing Quick Step, take these steps:

1. On the **Home** tab, in the **Quick Steps** group, click the expand icon.
2. In the **Manage Quick Steps** dialog box, select a Quick step.
3. Click **Edit**.
4. In the **Edit Quick Step** dialog box, configure the action.
5. Click **Save**.

If the default quick steps don't meet your needs, you can create a new Quick Step from a Template or create a custom Quick Step.

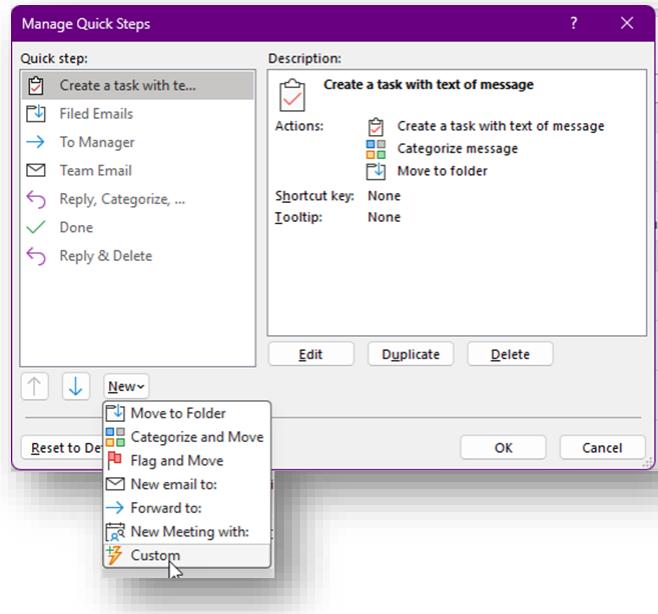
Templates include:

- Move to Folder
- Categorize and Move
- Flag and Move
- New email to
- Forward to
- New Meeting with

You can select **New** from the Quick Step menu or **Custom** from the **Manage Quick Steps** dialog box new dropdown to build a quick step entirely from scratch.

There are 24 options that you can mix and match from the following categories:

- Filing,
- Change Status,
- Categories,
- Respond,
- Appointment, and
- Conversations.

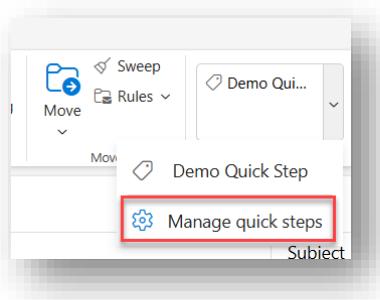


New Outlook or Outlook on the Web

There are no default Quick Steps or Templates in **Outlook on the Web**, instead you start from a blank slate.

To get started, follow these steps:

- Go to the **Quick Steps** group on the **Home** tab.
- There you can directly open the **Settings** menu by clicking **Manage Quick Steps**.
- From the Quick Steps **Settings** menu, click **+New Quick Step**.
- Provide a name.
- Select one or more of 20 available actions.
- (Optional) Assign a **Keyboard Shortcut** and **Description**.
- Click **Save** and close **Settings**.



To modify a Quick Step, take these actions:

- On the **Home** tab, select **Manage Quick Steps** from the **Quick Steps** group.
- Select the edit icon on the **Quick Steps Settings** page.
- On the **Quick Step** edit page, modify the action.
- Click **Save and Close Settings**.

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