



# Outlook Quick Steps

Email Management



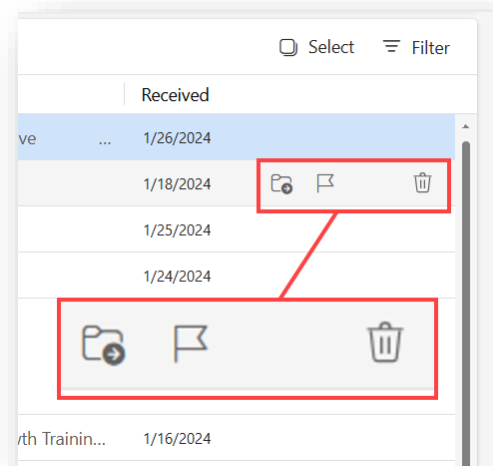
# Webinar Companion Handout

## Quick Actions

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

With the click of the mouse, you can:

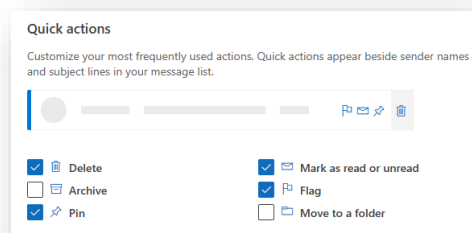
- Delete
- Archive
- Pin (not available in Classic Outlook)
- Mark as Read/Unread
- Flag
- Move to a Folder



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.

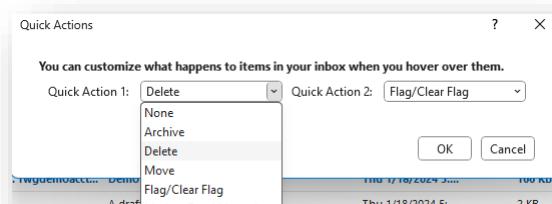


1. Go to **Settings**.
2. Go to **Mail**.
3. Go to **Customize Actions**.
4. Modify your options.
5. Click **Save**.
6. Close **Settings**.

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.



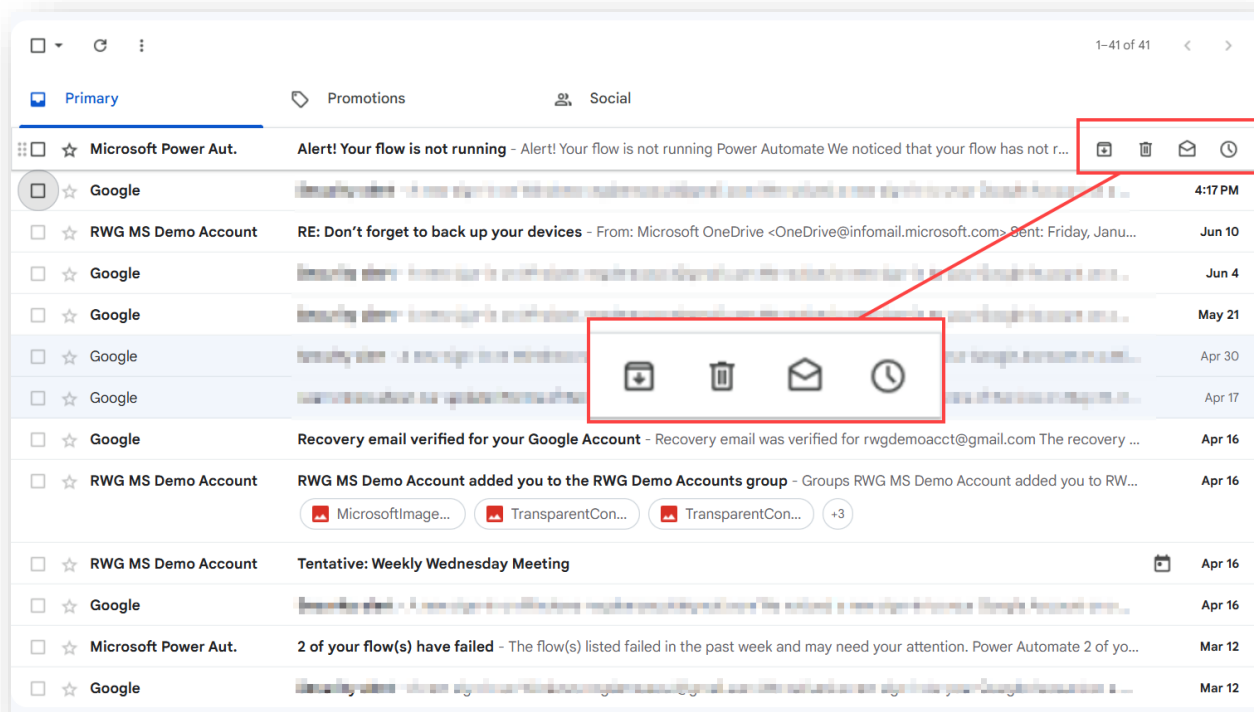
## Hover Actions in Gmail

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.

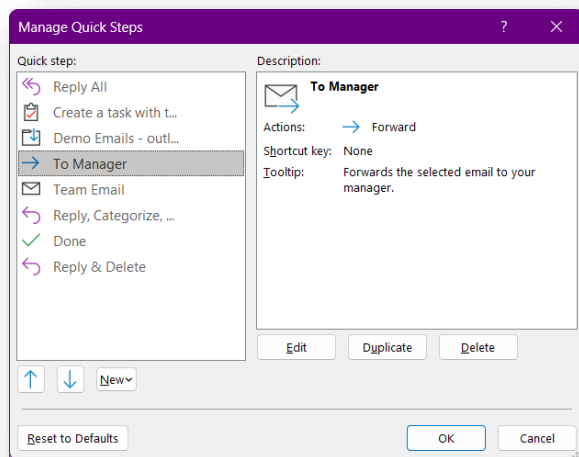
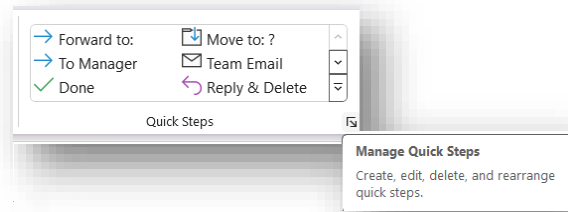
## Classic Outlook

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:

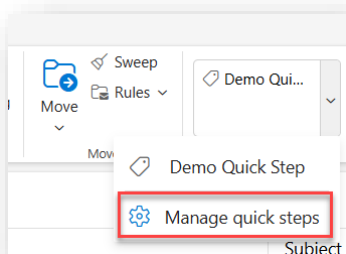
- Filing,
- Change Status,
- Categories,
- Respond,
- Appointment, and
- Conversations.

## 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.

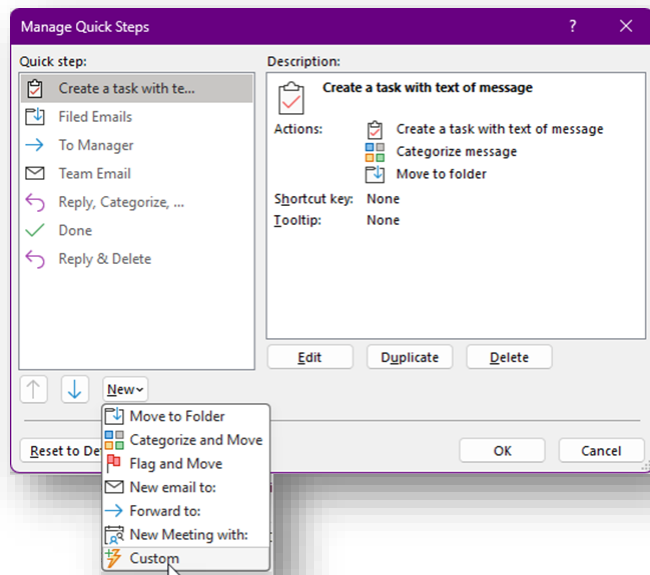
To get started, follow these steps:

- 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**.



# Rainwater Growth, LLC

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