

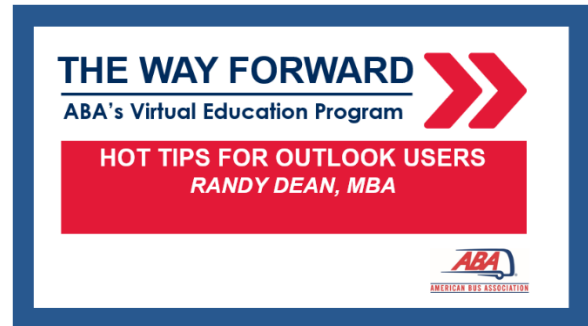
American Bus Association

Hot Tips for Outlook Webinar

Presented by Randy Dean, MBA

The E-mail Sanity Expert®

1/20/2022



Key Strategies Shared:

- FINDING E-MAILS/Confidence in Filing
 - Using Outlook “Categories” as labels in e-mail – better for Search
 - Renaming e-mail subject lines with “key words” to also help with Search
 - Tips on how to use the relocated Search tool for e-mail – categories, subject lines, all items
- CONVERTING E-MAILS TO TASK, CALENDAR, CONTACTS w/ DRAG & DROP
 - Basic: Left click, hold the click, drag to task, calendar, or contact (word or icon)
 - Attachments: Use Right-click instead – “Copy here as attachment”
 - Bonus content on Contacts: Adding a picture using “Snip & Sketch”/Snipping Tool
 - Adding additional info on Contacts using Details and/or All Fields buttons
- OUTLOOK BASIC SCREEN OPTIONS/MODIFICATIONS
 - Moving from Words to Icons for Key Functions (bottom screen ellipses)
 - Changing tab settings using tool in upper right corner of screen
 - Customizing Quick Access toolbar (upper left) both on main screen and within individual e-mails
- AUTOMATING TEXT IN E-MAILS: Quick Parts and Signatures
 - Using Quick Parts under Insert tab in open e-mail for frequently used “blurbs”
 - Using Signatures as an “Auto E-mail” tool – full length messages!
 - (Check out my related YouTube video for more details on set up)
- OUTLOOK CALENDAR TIPS AND SETTINGS:
 - Using Categories to “Color Code” different types of calendar entries
 - Different views: Day, Work Week, Week, Month, Next 7 Days
 - Using “Click then Drag” to see a two-week view of Calendar
 - Holding down CTRL key then selecting dates to see “every Thursday”
 - Using “Schedule View” to see multiple different calendars together
 - Changing Time Slots on side of calendar from 60 min view to 30 min view
 - Setting up a repeating reminder and/or showing a second time zone in calendar in File-Options-Calendar (upper left corner of screen)
 - Setting up Outlook to show Calendar first (not inbox!) in File-Options-Advanced

- TASK FUNCTION OPTIONS AND TOOLS IN OUTLOOK
 - (Remember, much greater detail in my two related YouTube videos on Outlook tasks)
 - My favorite view: the “Today” view – only today’s tasks
 - How I use the “Active View” arranged by Category (label!) to see my tasks instead by project/person/client/activity/event
 - A brief look at the “Next 7 Days” View
 - The power of the “Completed Items” view for tracking completions and accomplishments
 - “The dogs need a bath” – example on how I track delegations and even can use “Assign Task” button to forward a task request to another

*For reference, here is the link to my **YouTube Channel “Viewer’s Guide”** where you can do much deeper self-study on many of these tips and more!*

https://randalldean.com/wp-content/uploads/2022/01/YouTube_Guide_Timelyman.pdf

And here’s My “Quick Tips” for Outlook Users PDF:

https://www.randalldean.com/Randy_Dean_Quick_Tips_for_Outlook_Excellence.pdf

Enjoy! Hope to see you at a future ABA event or webinar!



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See a full listing of Randy's most popular programs here:

http://www.randalldean.com/Randy_Dean_Popular_Program_Descriptions_BF_2021.pdf

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