



throttle.net.com



# TODAY'S PRESENTER:

**Chris Montgomery**

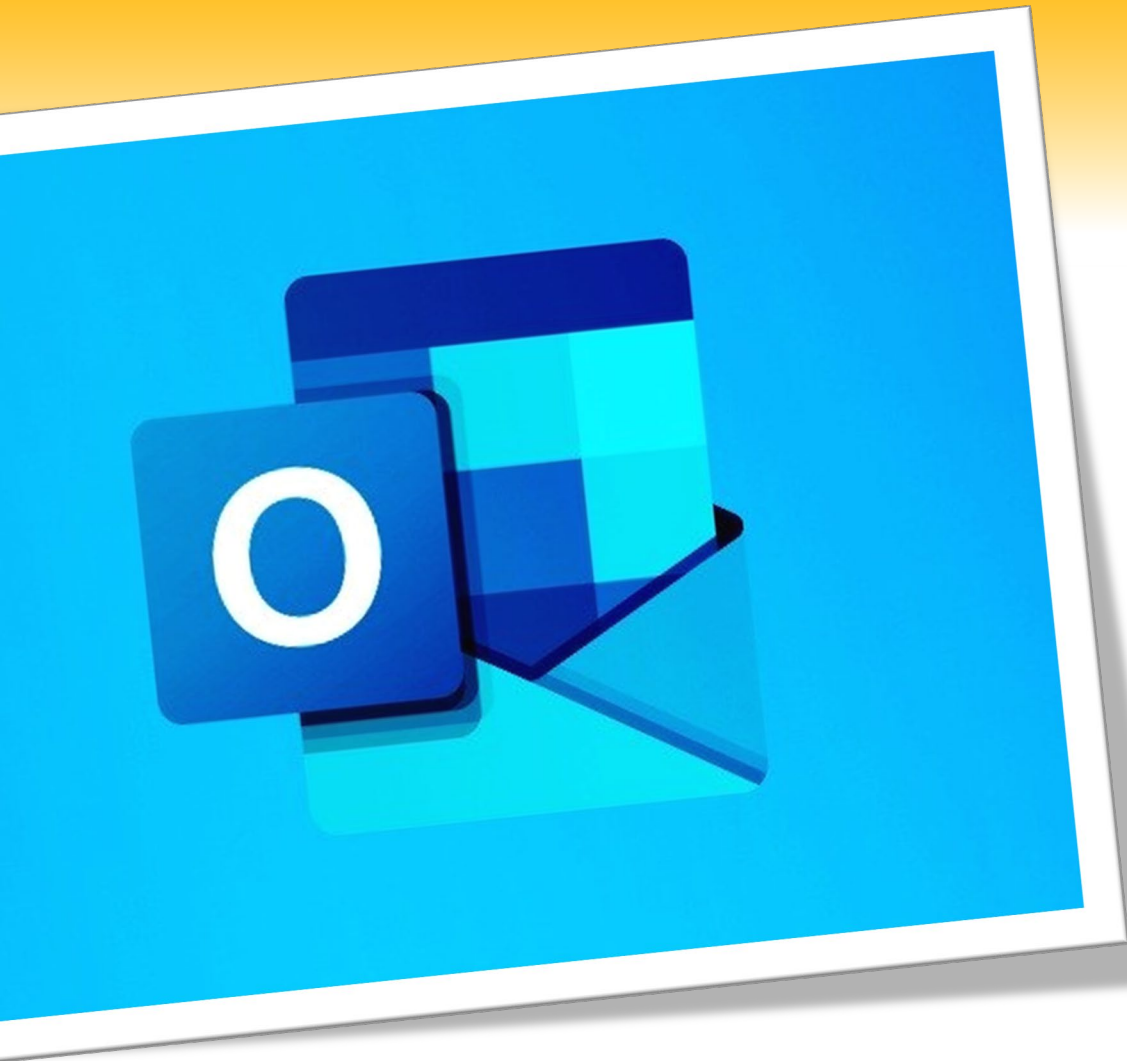
*Director of Sales*



[throttlenet.com](http://throttlenet.com)



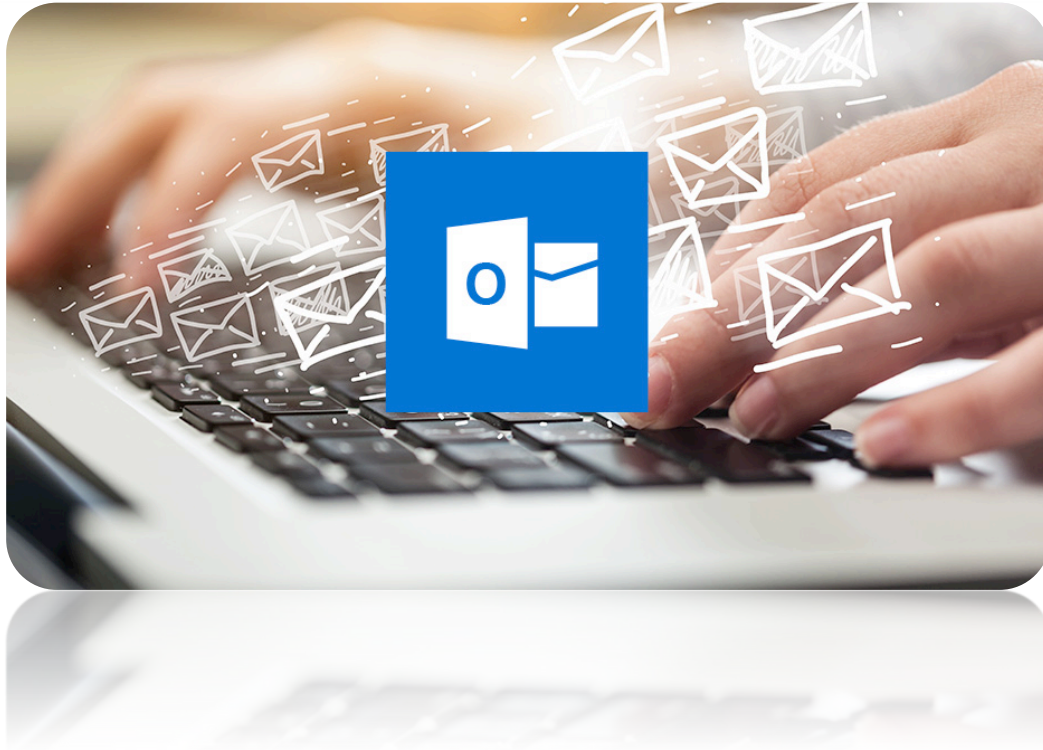
# How to use MICROSOFT OUTLOOK?



# WHAT IS MICROSOFT OUTLOOK?

Microsoft Outlook, or simply Outlook, is a personal information manager from Microsoft, available as a part of the Microsoft Office suite. Primarily an email application, it also includes a calendar, task manager, contact manager, note taking, journal, and web browsing.

# What does **MICROSOFT OUTLOOK** include...

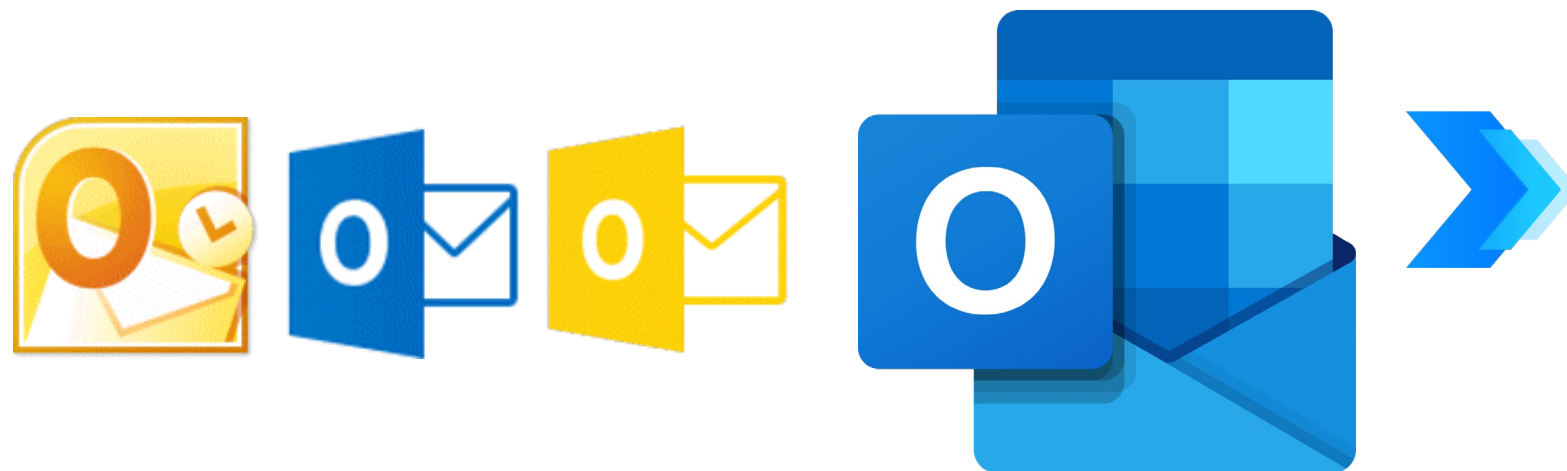


- Access to your mail
- Host Calendar
- Contacts
- To Do List





# What is the most current version of **MICROSOFT OUTLOOK**?

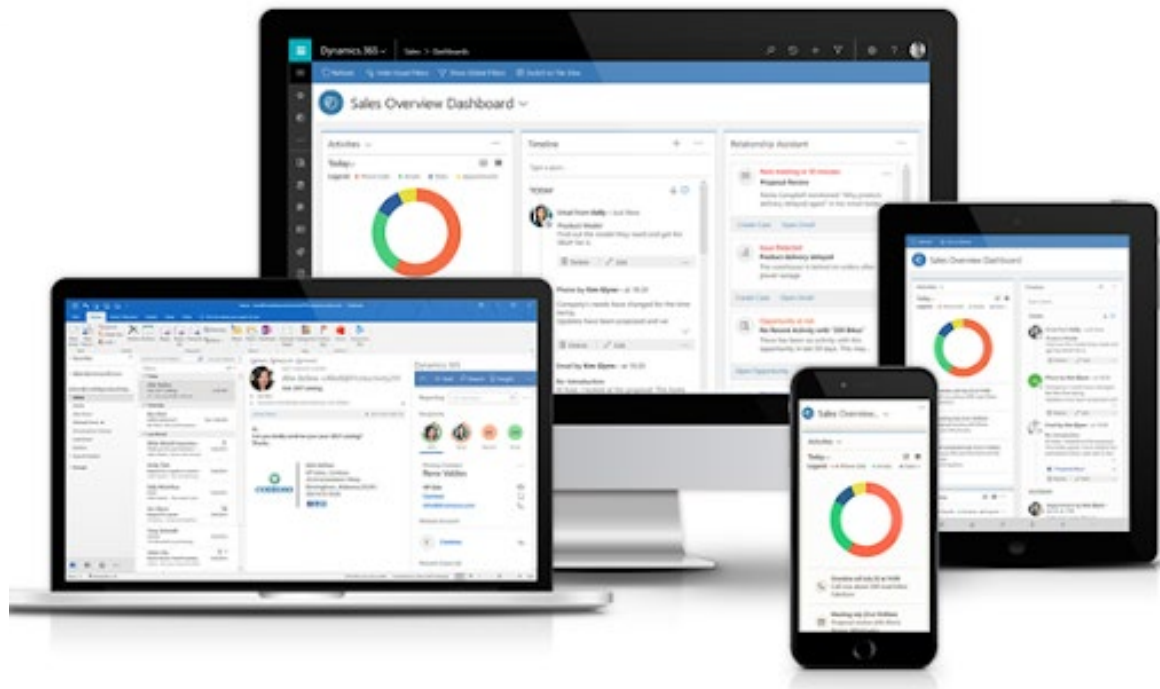


At this time, the supported version of Outlook include, 2010, 2013, 2016 and 2019 with end of life for 2010 being **October 13<sup>th</sup>, 2020**

# HOW DO I GET MICROSOFT OUTLOOK?

Outlook is included with  
Microsoft 365 as well as Office





# What are the benefits of **MICROSOFT OUTLOOK**





# MICROSOFT OUTLOOK BENEFITS



## Access Messages in An Organized Environment

Outlook utilizes a folder system that enables efficient message organization. You can easily access each message and any accompanying attachments all in one place. Likewise, tasks such as sending messages and attaching files can also be accomplished in an organized fashion.



## Use Keyboard Commands to Quickly Perform Tasks

Keyboard commands simplify the processes of sending, replying to, and forwarding messages as well as navigating the inbox and other folders. No need to laboriously search through links to find what you're looking for when you can perform a specific task by executing a keystroke.



# MICROSOFT OUTLOOK BENEFITS



## Manage Contacts

The Outlook desktop email client allows you to manage contacts through simple navigation and keyboard commands. Easily access the address book and find important contacts when you need to send messages or meeting requests. In addition, you can easily share contact business cards via Vcards within Outlook.



## Access Calendar Features

The Outlook calendar provides an efficient means of creating appointments and multiple ways of viewing your schedule. Quickly send meeting requests to contacts and use the month, week, or day views to access upcoming appointments. The same keyboard commands you use to read and create emails are also available for performing similar tasks in the calendar.





# MICROSOFT OUTLOOK BENEFITS



## Outlook is Commonly Used in the Workplace

Companies in a variety of industries are choosing Outlook as their email client because of its robust features and capabilities. Becoming familiar with this application can contribute to employability and increase productivity in the workplace.

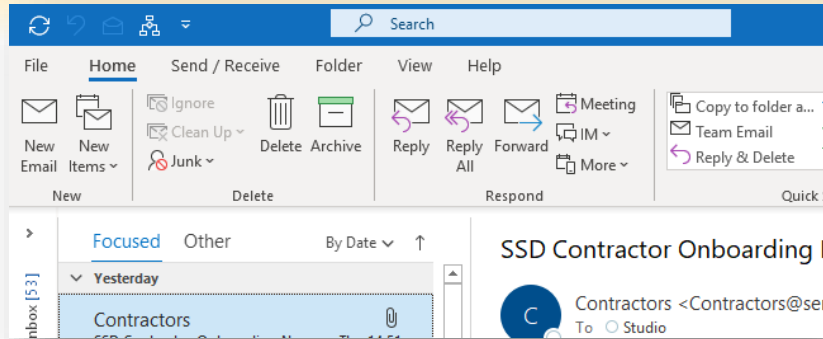


## Integration with MICROSOFT TEAMS

Outlook now integrates with Teams allowing you to schedule Teams meetings directly from Outlook.

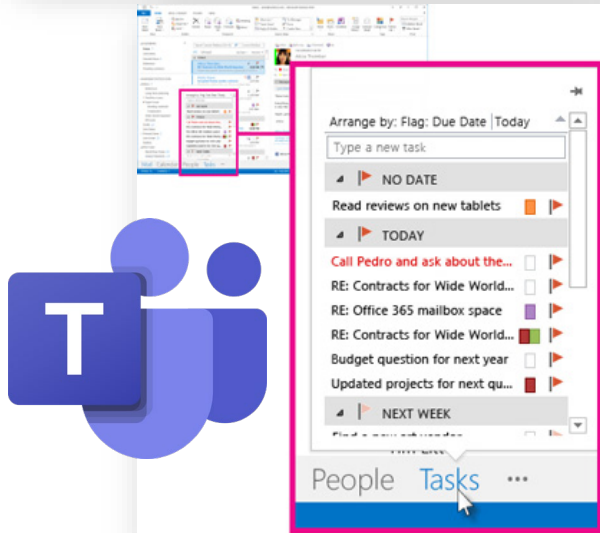


# MICROSOFT OUTLOOK BENEFITS



## Easily Search your Inbox or any Inbox Folder

You can search your mailbox based on keywords or you can filter your inbox based on attachments, unread emails and more



## Ability to Create To Do List with Teams

The To Do list feature allows you to create new tasks including the subject, status, start date and due date along with detail for each. You can then assign a task or send status reports on assigned tasks



# MICROSOFT OUTLOOK BENEFITS

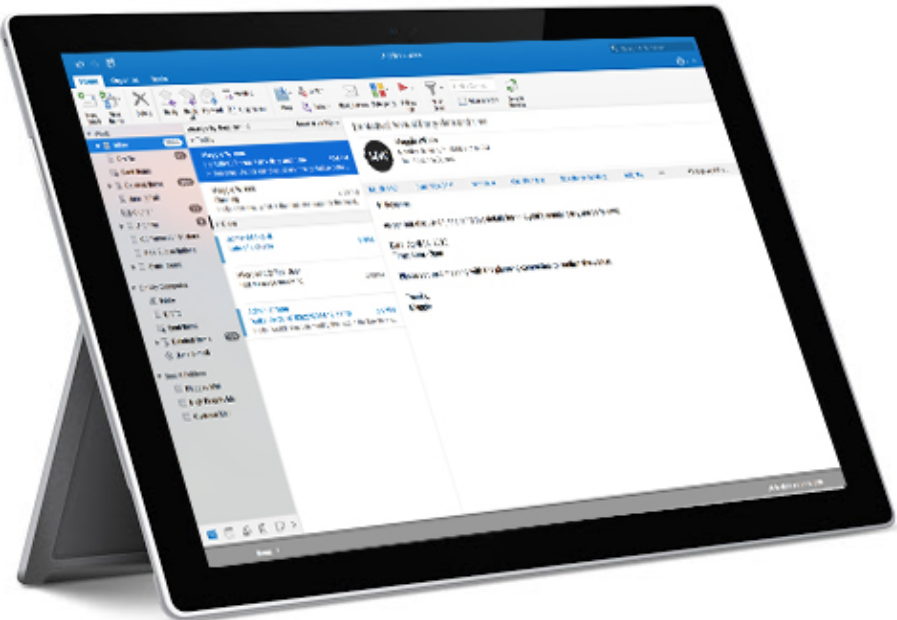


## Integration with **MICROSOFT ONE NOTE**

This benefit allows you to share your emails with **Microsoft OneNote** for collaboration purposes







# SECTION 01

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# MAIL





# CLEAN UP YOUR INBOX IN ONE CLICK

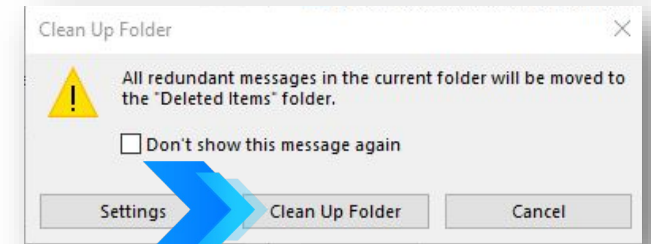
To clean up your inbox quickly:



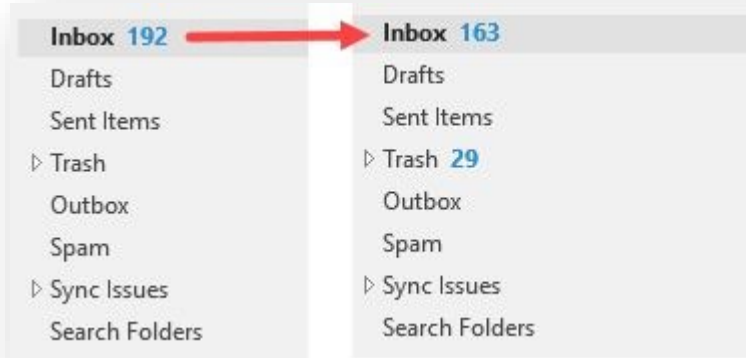
While viewing your inbox, click the "Clean Up" button, and select "Clean Up Folder."



Click the "Clean Up Folder" button in the popup to confirm the action.



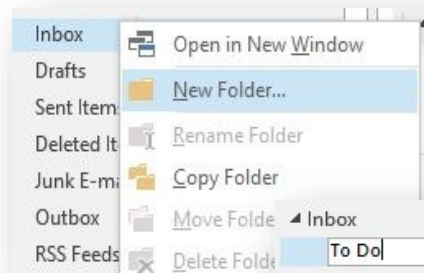
Outlook will automatically remove all duplicate emails, leaving you with significantly fewer emails to sort through.



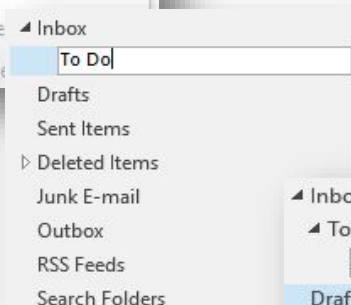


# MOVE COMPLEX AND NON-CRITICAL EMAILS INTO A TO-DO FOLDER

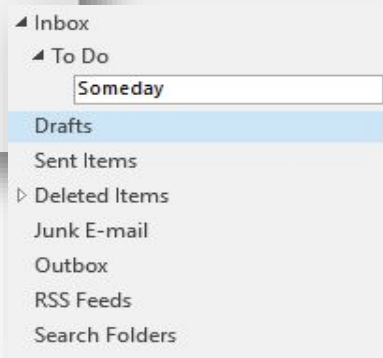
To create these folders:



Right-click your "Inbox" folder, and select "New Folder."



Title the first folder "To Do."



Click the arrow next to the Inbox folder to view your new To-Do folder. Right-click the To-Do folder, select new folder, and name this folder Someday."



Repeat to create a "Follow Up" subfolder under the To-Do folder.



# MOVE COMPLEX AND NON-CRITICAL EMAILS INTO A TO-DO FOLDER

When new emails arrive, move them to the appropriate folder:



**INBOX** – The only emails that stay in your inbox are those that you should answer immediately. They're either urgent or can be handled quickly (in three minutes or less).



**TO DO** – Drag non-urgent emails and emails that will require more than a three-minute response into your to-do folder. You'll follow up on these items later, but moving them immediately keeps your inbox empty while you process the emails.





# MOVE COMPLEX AND NON-CRITICAL EMAILS INTO A TO-DO FOLDER

When new emails arrive, move them to the appropriate folder:



**FOLLOW- UP** – Move emails to this folder that are put on hold. Things like replies you're waiting to get or tasks that you've delegated.



**SOMEDAY**– Some emails don't require a response. Instead, they're things you'd like read/review one day when you have time. Drag those into the someday folder to review at some point in the future when work slows down and you need something to do. This might be the equivalent of an Archive folder, but you can use it for items that you'll need to quickly access in the next few weeks.

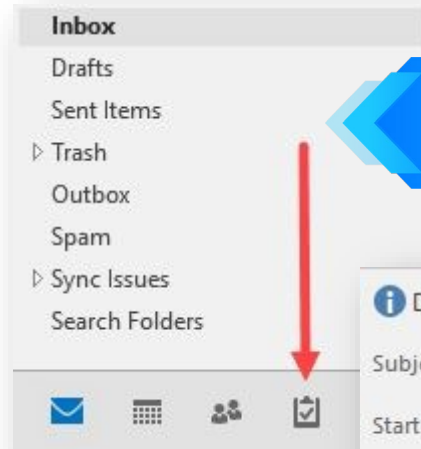






# USE OUTLOOK'S TASK LIST INSTEAD OF CLOGGING YOUR INBOX

Create a reminder by adding these emails to Outlook's task list:



Drag the email and drop it on Outlook's task list icon.

**Due in 2 days.**

Subject	Answer This By Friday		
Start date	None	Status	Not Started
Due date	Thu 8/31/2017	Priority	Normal
<input checked="" type="checkbox"/> Reminder	Thu 8/31/2017	8:00 AM	% Complete 0%

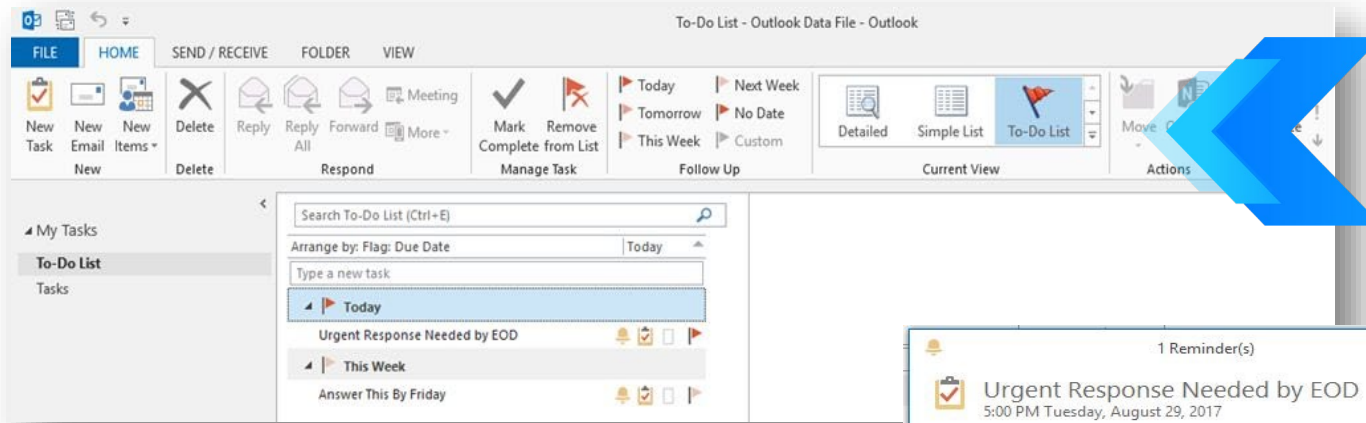


Add a due date and set a date and time to receive a reminder. Save the task.

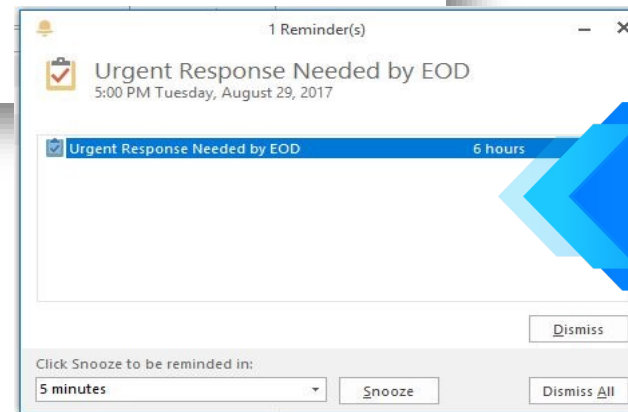




# USE OUTLOOK'S TASK LIST INSTEAD OF CLOGGING YOUR INBOX



You can now hover your cursor over the task list icon to see a quick view of your task list, organized by due date. Click on the task list icon to open your to-do list and review the respective tasks.

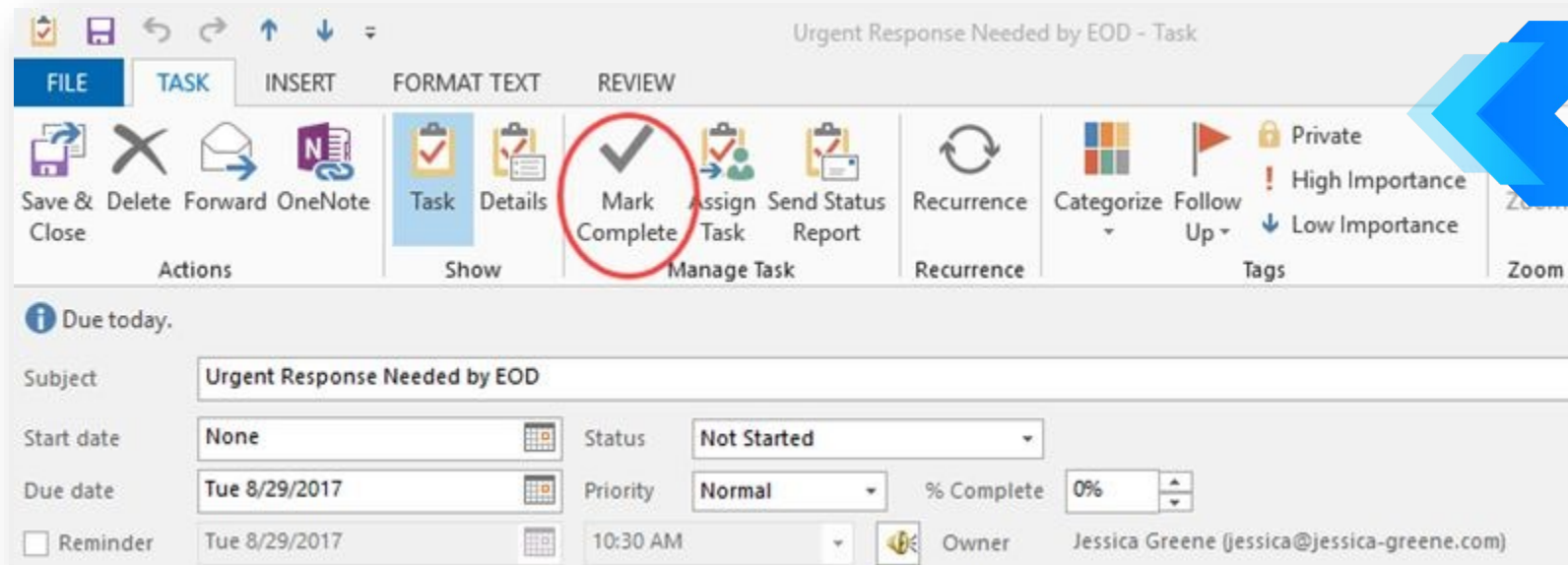


If you set a reminder, the task will pop up like a meeting reminder at the specified time.





# USE OUTLOOK'S TASK LIST INSTEAD OF CLOGGING YOUR INBOX



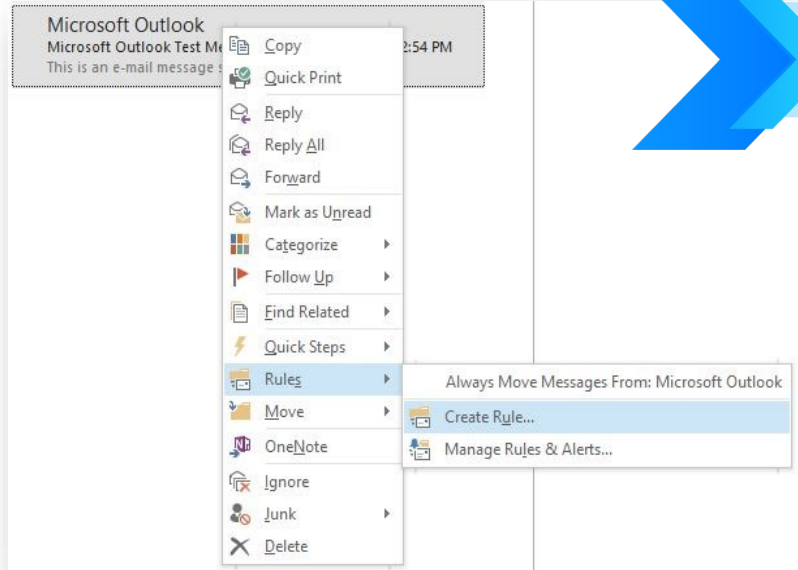
Once the task is complete, mark it as such to remove the task from your to-do list. Open the task by double-clicking it, and click the "Mark Complete" button—or just press the Insert key to quickly mark the item complete.





# USE RULES TO AUTOMATICALLY SORT EMAILS AND STOP RECEIVING IRRELEVANT EMAILS

You can use Outlook rules to automatically sort incoming emails to the appropriate folder, such as always sending emails that are from your boss with a certain subject line to the To-Do folder and emails from a newsletter you regularly read to the Someday folder.



Right-click the email, hover over "Rules," and select "Create Rule."



Choose the criteria for the rule:



"From [Sender]" will execute the rule any time you receive an email from a specific email address or contact.



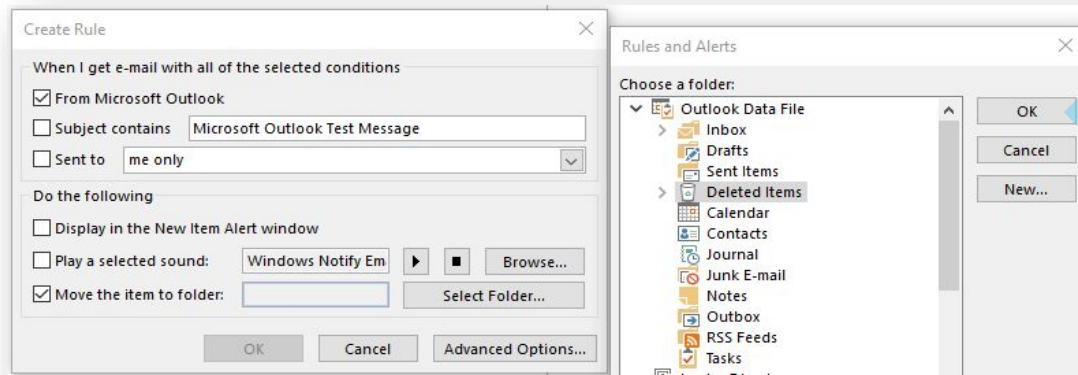
"Subject contains" will execute the rule any time a specified subject line is used.





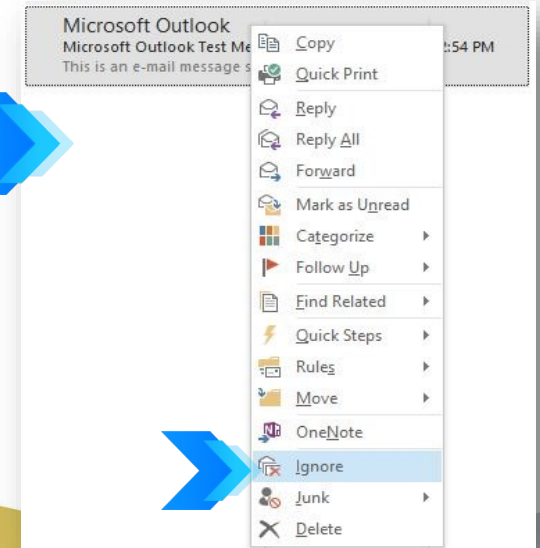
# USE RULES TO AUTOMATICALLY SORT EMAILS AND STOP RECEIVING IRRELEVANT EMAILS

- Select what happens when the rule runs. To sort emails out of your inbox and into the appropriate folder, check "Move the item to folder," and select the folder where you want the emails to be sent. You can choose the "Deleted Items" folder if you never want to see them, or you can create a separate archive folder if you may need to review the emails in the future.



Click "OK" to apply the rule. Want to prevent getting future emails on a specific thread? In that case, instead of creating a rule, you can just use Outlook's ignore function. Right-click the email, select "Ignore," and confirm the action.

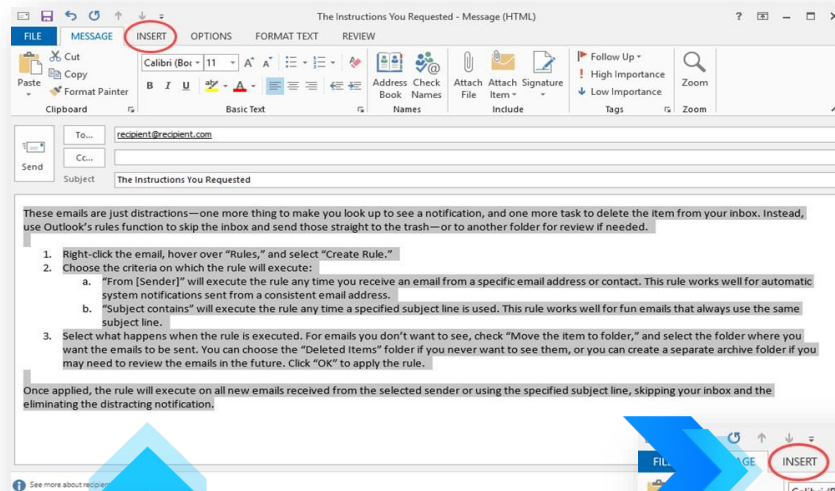
Ignore automatically sends future replies to that thread to your "Deleted Items" folder so you don't receive them in your inbox.



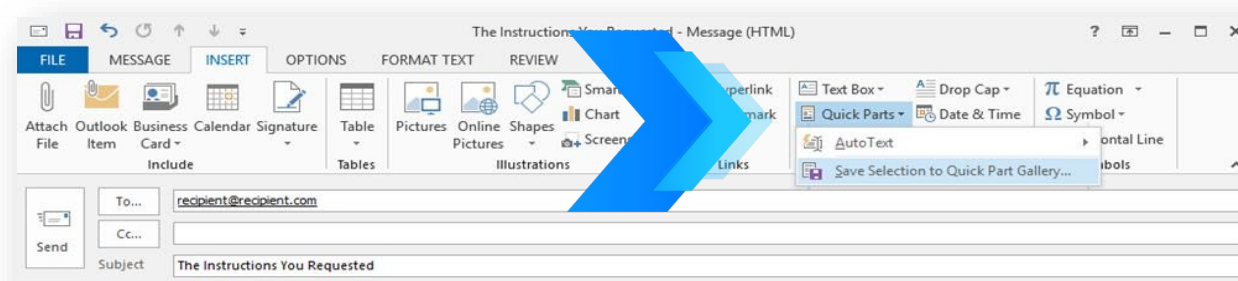




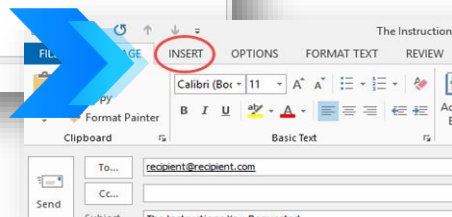
# CREATE QUICK PARTS FOR DEFAULT RESPONSES TO COMMON QUESTIONS



Highlight the text you want to save in the email, and click the "Insert" tab.



Within the "Insert" menu, click "Quick Parts," select "Save Selection to Quick Part Gallery."



Give your new Quick Part a descriptive name, and click "OK."



Create New Building Block

Name:	Create Outlook Rule Instructions
Gallery:	Quick Parts
Category:	General
Description:	
Save in:	NormalEmail
Options:	Insert content only
<input type="button" value="OK"/> <input type="button" value="Cancel"/>	

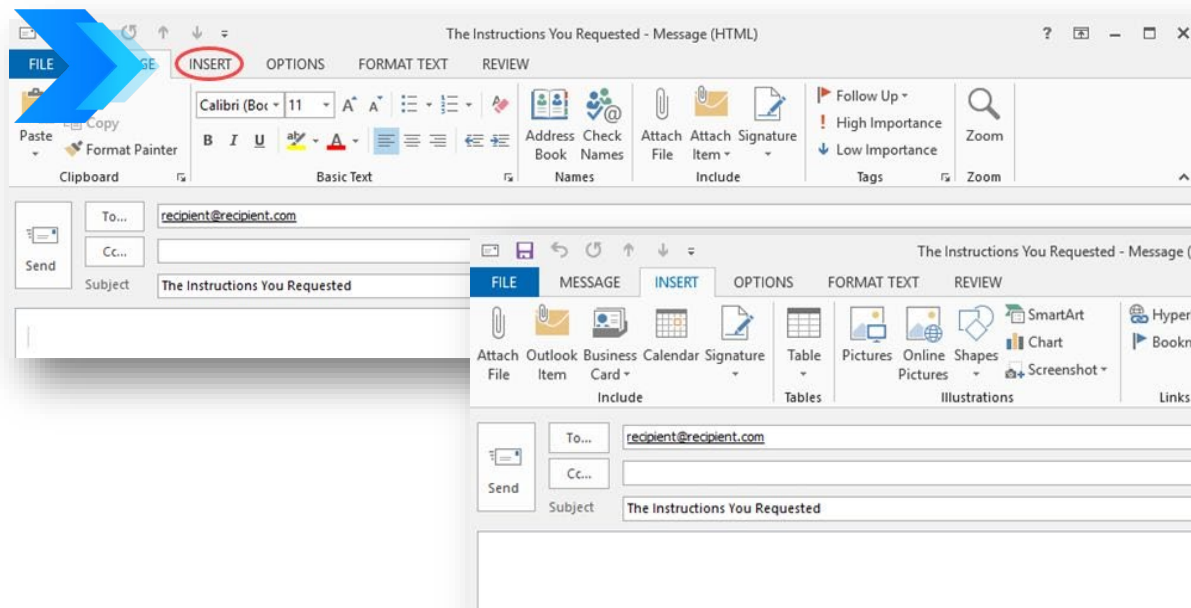




# CREATE QUICK PARTS FOR DEFAULT RESPONSES TO COMMON QUESTIONS



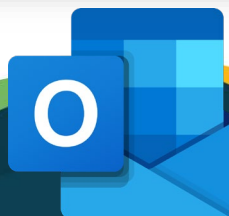
With this Quick Part saved, you can now add that text to any email with just a couple clicks. With your cursor in the body section of the email, click the "Insert" tab.



Click "Quick Parts," and then select the Quick Part you want to insert.



The prewritten text will automatically appear in the body of your email, and you can edit and customize it as needed for your new response.



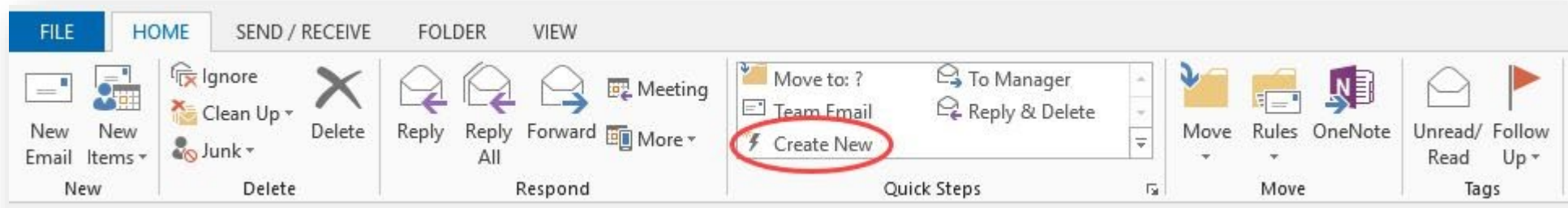


# USE QUICK STEPS TO TAKE INSTANT ACTION ON NEW EMAIL

Quick Steps can take care of the last two steps for you with fewer clicks than if you performed the tasks manually:



Click the "Create New" button in the Quick Steps section of the Home ribbon.

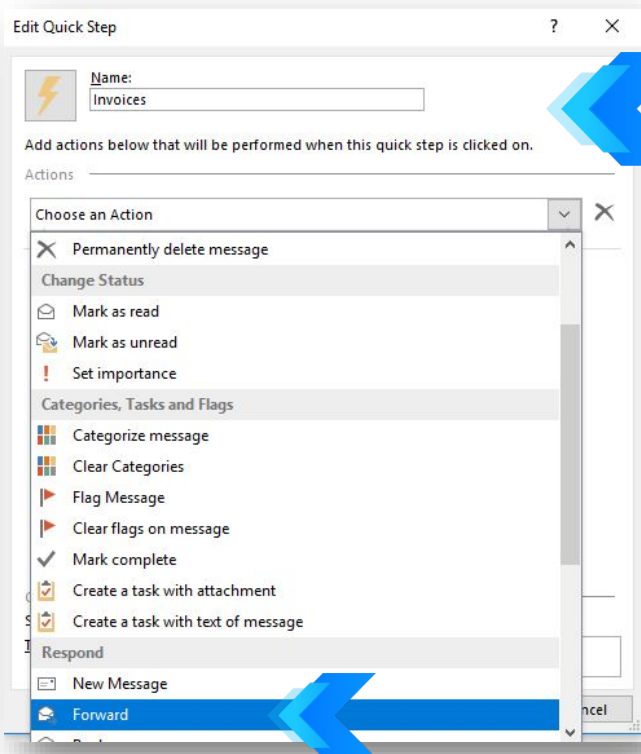


Give the new Quick Step a descriptive name, and select the first action: "Forward."

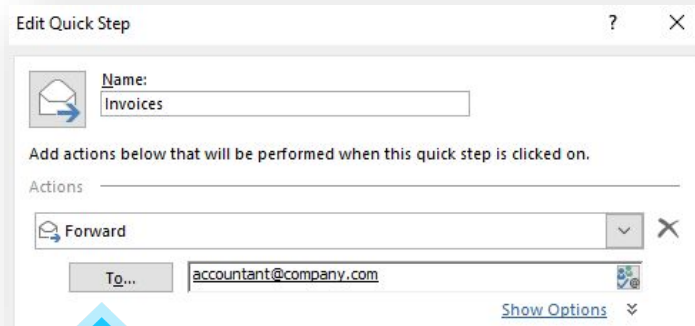




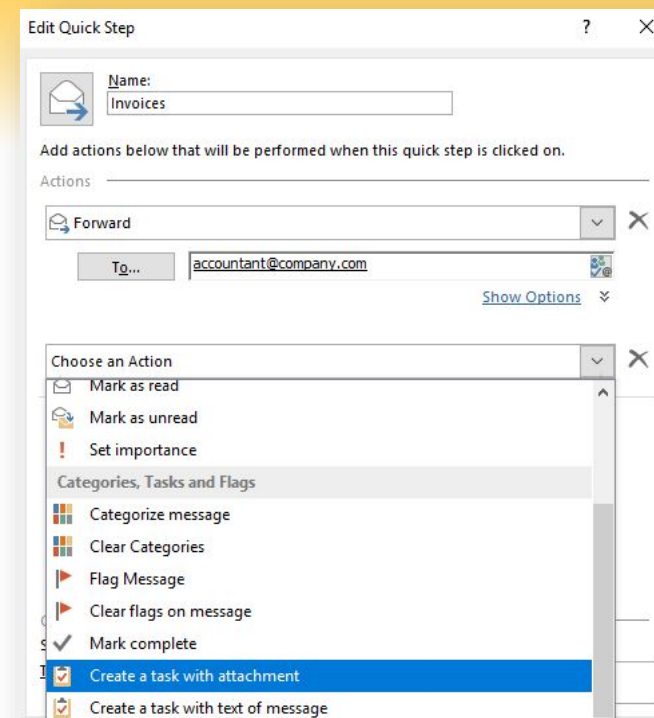
# USE QUICK STEPS TO TAKE INSTANT ACTION ON NEW EMAIL



Give the new Quick Step a descriptive name, and select the first action: "Forward."



Type your accountant's email address into the "To" field.



Click the "Add Action" button to select the second action: "Create a task with attachment."

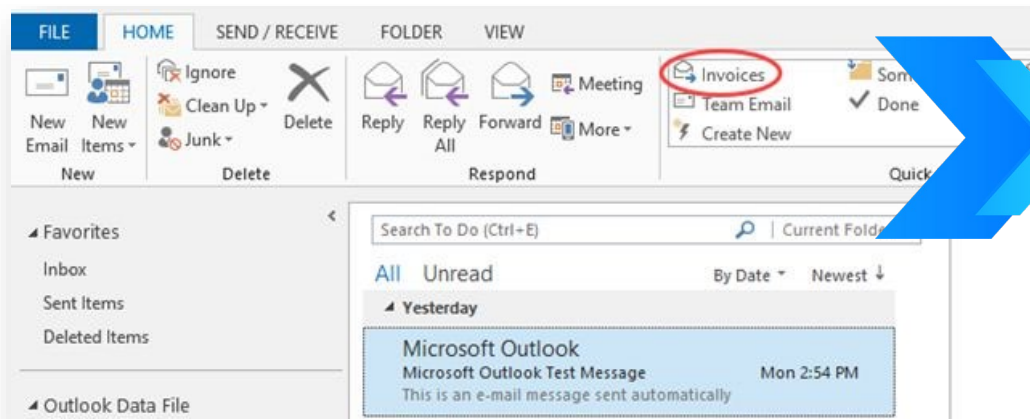
Click "Finish" to create the Quick Step.







# USE QUICK STEPS TO TAKE INSTANT ACTION ON NEW EMAIL



After you review an invoice, you can now execute the Quick Step to forward the email and create a reminder task. Select an email containing an invoice, and click the appropriate Quick Step in the Home ribbon.



The email forward and task windows will open automatically. Click Send to forward the email, and set a due date and reminder for the task before saving, if you'd like. There are many different ways to use Quick Steps to speed up email processing. Spend some time thinking about the repetitive actions you take on emails, and set up Quick Steps to make managing your emails so much quicker and almost painless.



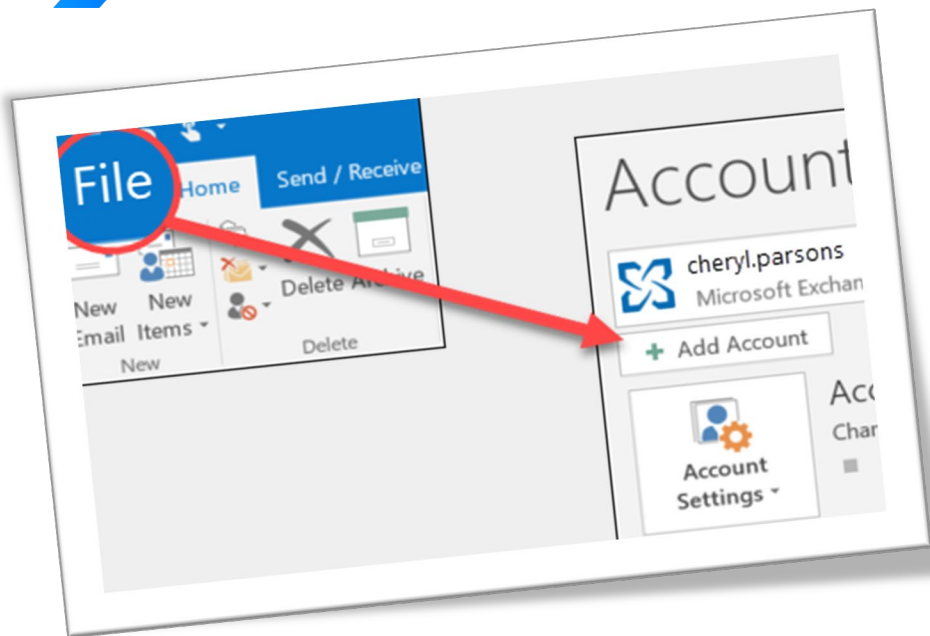




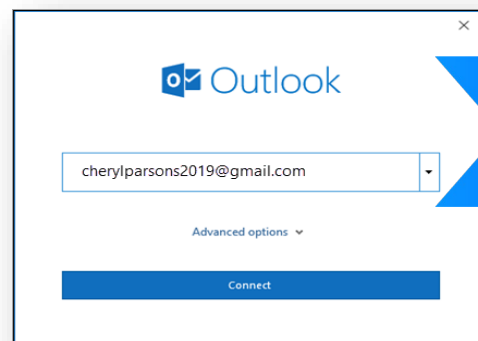
# HOW TO SYNC YOUR PERSONAL EMAIL ACCOUNTS



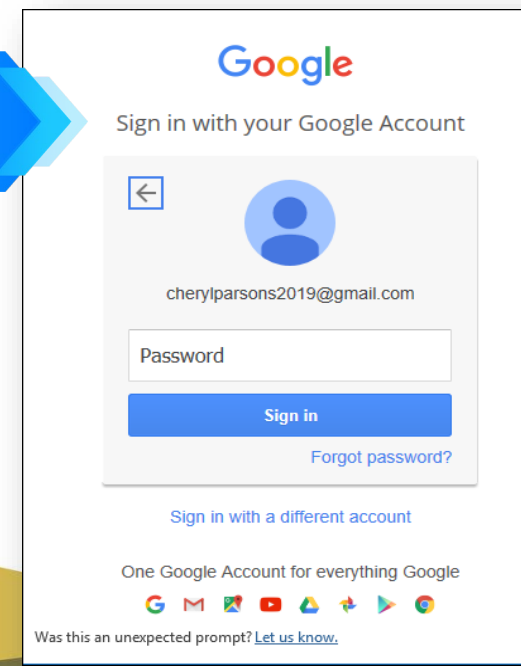
Select **File** > Add Account.



Enter your email address and click **CONNECT**.

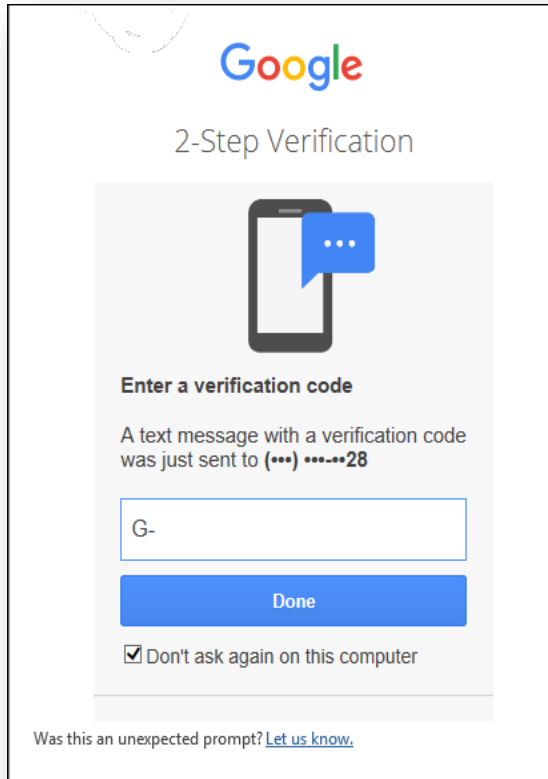


Outlook will launch a Gmail window that asks for your password. Enter the password and select **SIGN IN**.





# HOW TO SYNC YOUR PERSONAL EMAIL ACCOUNTS



Google

2-Step Verification

Enter a verification code

A text message with a verification code was just sent to (\*\*\*-\*\*\*-28)

G-

Done

☒ Don't ask again on this computer

Was this an unexpected prompt? [Let us know.](#)

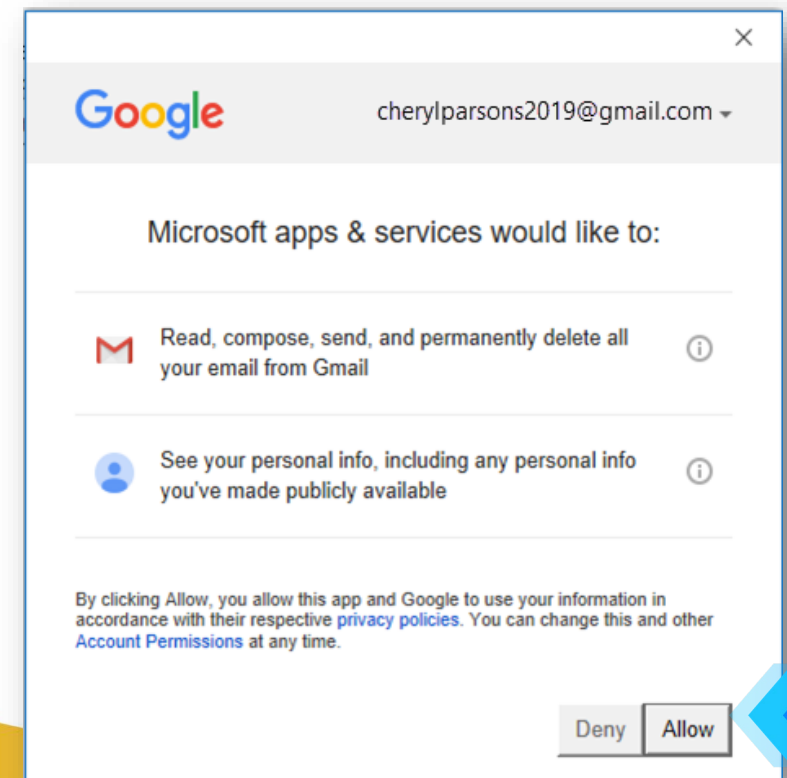
**Important:** Once you connect your Gmail account to Outlook, you may receive a warning message in your Gmail inbox telling you that a new login from Internet Explorer was detected. This is expected behavior.

**If you have previously enabled 2-factor authentication for Gmail, you'll be prompted to enter the code sent to your mobile device.**

**If you haven't enabled 2-factor authentication, skip to step 6.**





**The Google account permissions window appears. Click **Allow**.**



Google cherylparsons2019@gmail.com

Microsoft apps & services would like to:

-  Read, compose, send, and permanently delete all your email from Gmail
-  See your personal info, including any personal info you've made publicly available

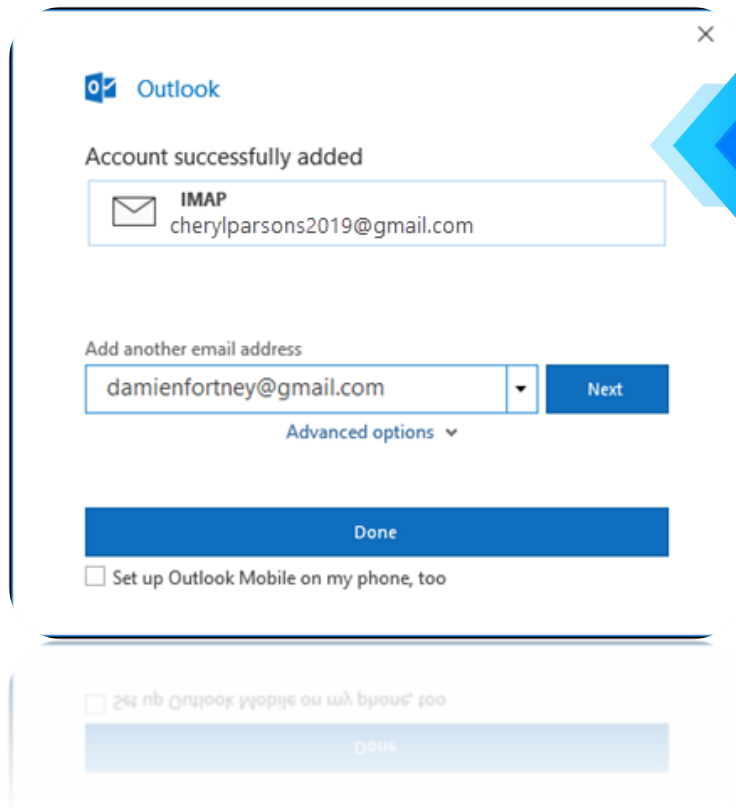
By clicking Allow, you allow this app and Google to use your information in accordance with their respective [privacy policies](#). You can change this and other [Account Permissions](#) at any time.

Deny Allow





# HOW TO SYNC YOUR PERSONAL EMAIL ACCOUNTS



Outlook

Account successfully added

IMAP  
cherylparsons2019@gmail.com

Add another email address

damienfortney@gmail.com

Next

Advanced options ▾

Done

☐ Set up Outlook Mobile on my phone, too

Once Outlook finishes adding your Gmail account, you can add another email account or select **Done**.

*TIPS: If you check the box for Setup Outlook Mobile on my phone, too, you'll be taken to a website where you can enter your mobile phone number and you'll receive a link to download Outlook for iOS or Outlook for Android. Installing Outlook Mobile is a great way to stay up-to-date on the go.*



Outlook

Complete your Outlook setup and get the same, great experience while on the go.

Enter your phone number and we'll send a download link.

+1 • 201-555-5555

Send link

By sending your phone number or email, you agree to receive a one-time automated message from Microsoft to this mobile phone number. Consent is not necessary to get or use the app. Standard SMS rates apply. [Microsoft Services Agreement](#) and [Microsoft Privacy Statement](#).

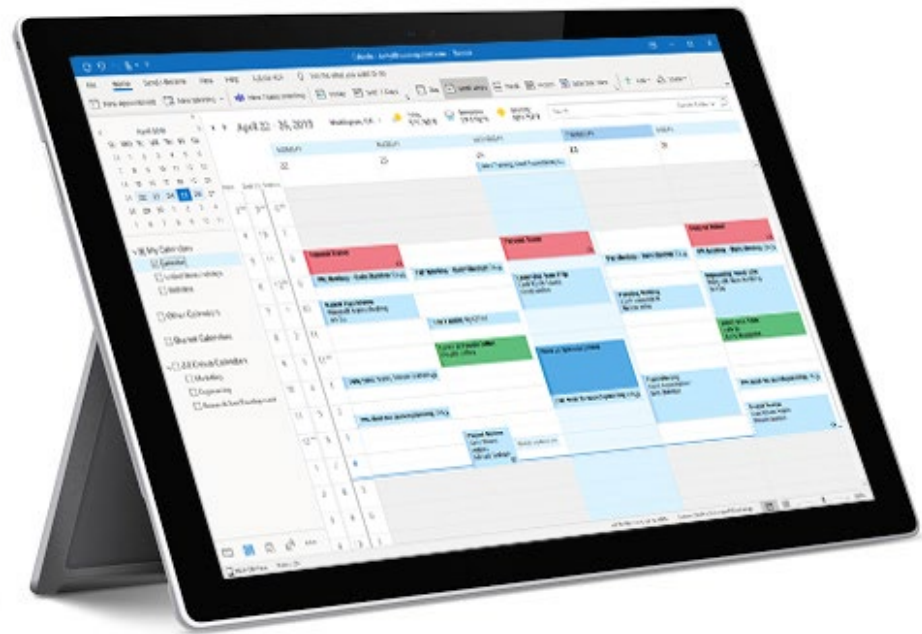
Also available at

Download on the App Store

GET IT ON Google Play

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# SECTION 02

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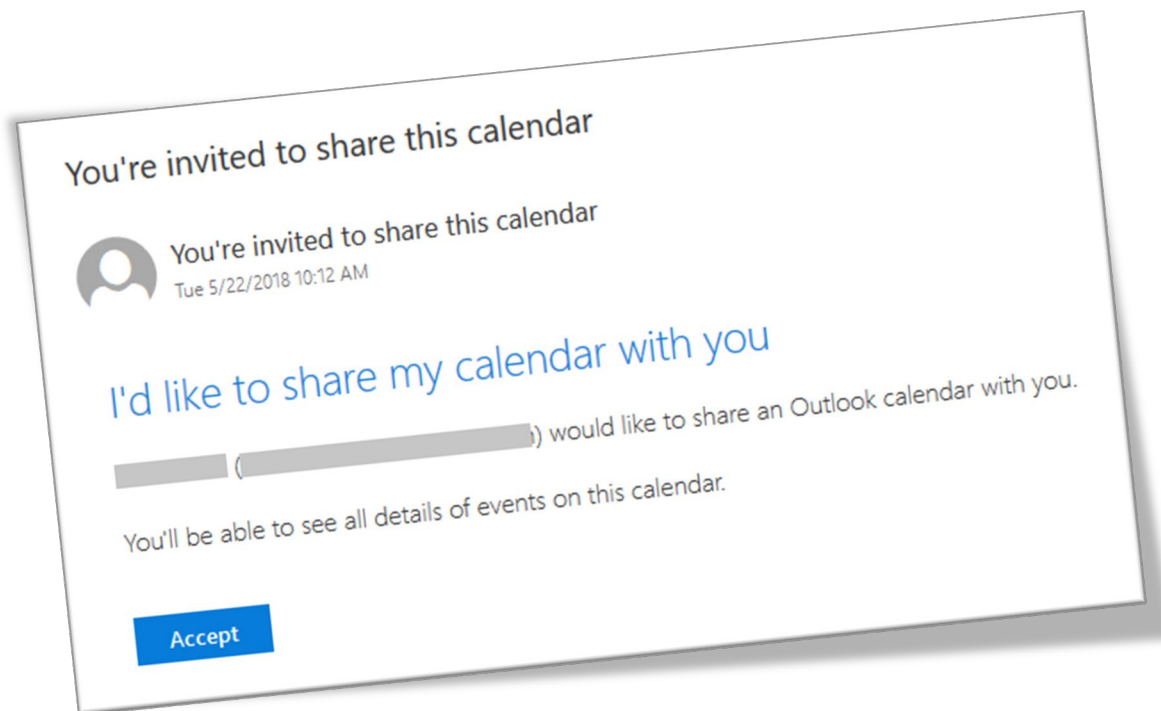
# CALENDAR





# SHARING YOUR CALENDAR

To share your OUTLOOK Calendar:



Click 'Share Calendar' from the 'Folder' tab.



Enter the name of the person you would like to access your calendar, and then click 'Send'.



Once your coworker accepts your invitation, your calendar will show up in their calendar list.





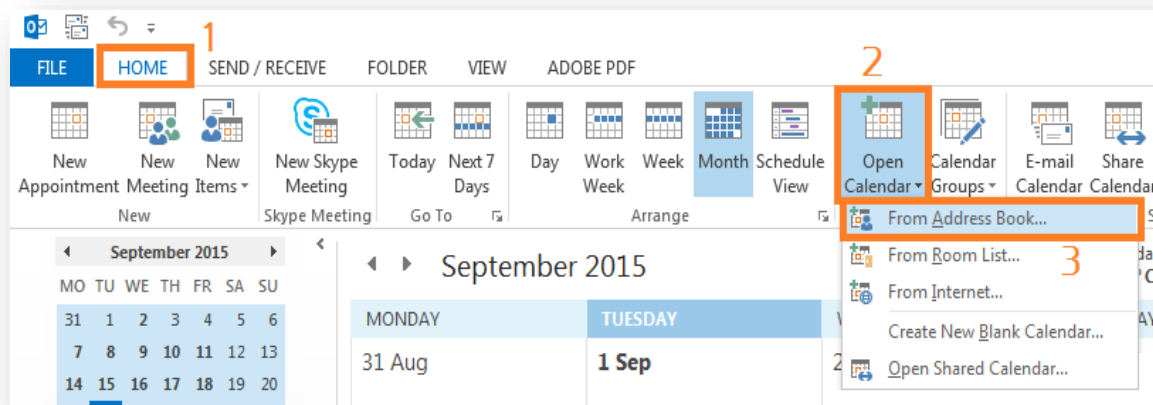
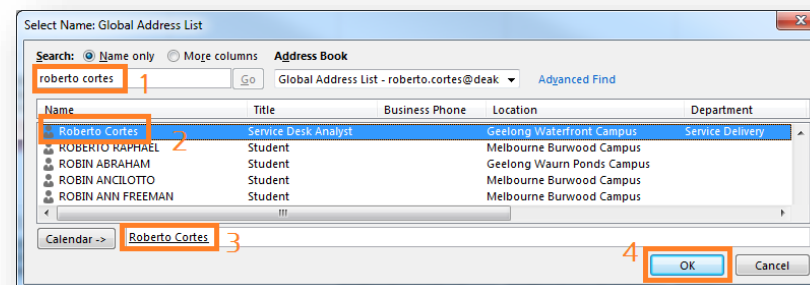
# VIEWING OTHER CALENDARS

## To View an OUTLOOK Calendar:

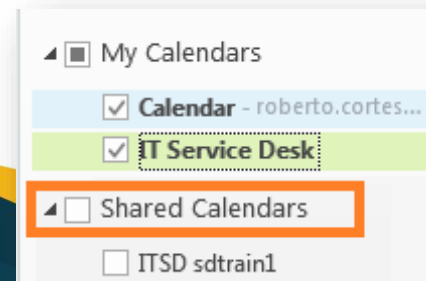
- Open OUTLOOK
- Enter CALENDAR Mode
- On the Home tab click Open Calendar and select From Address Book...

➤ Browse for names or type them in the Search box.

➤ Double click the name required and click OK.



➤ The calendar has been added under the Shared Calendars heading.

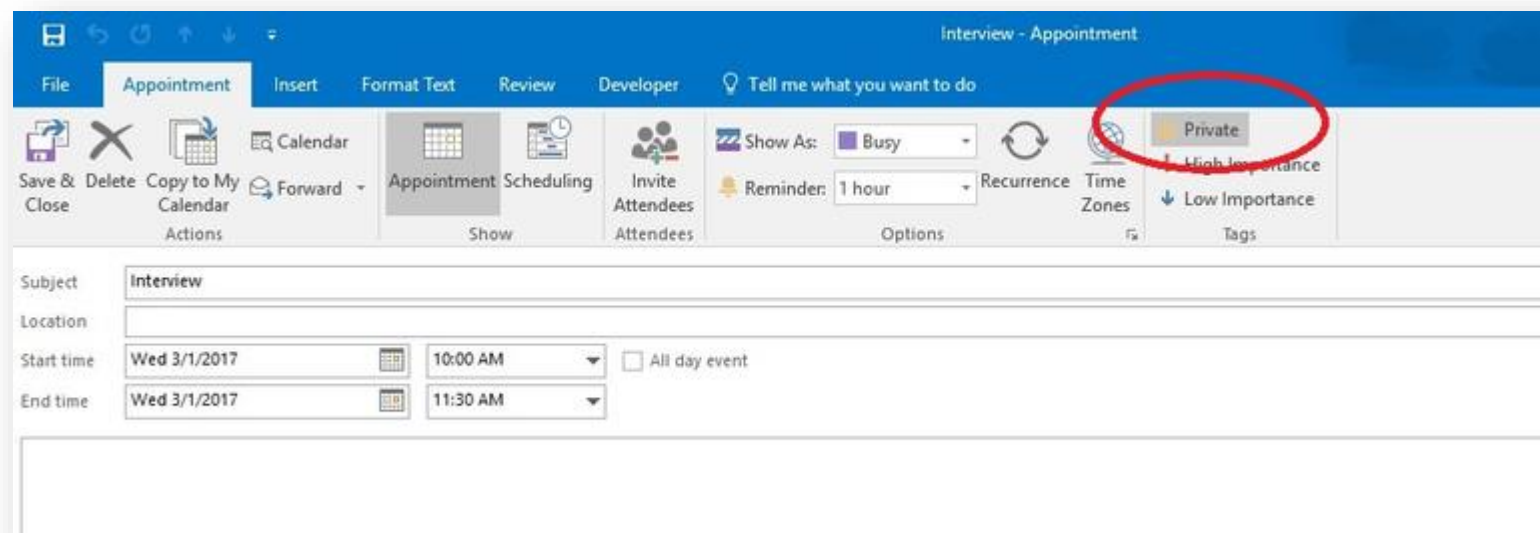


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# SET PRIVATE MEETINGS



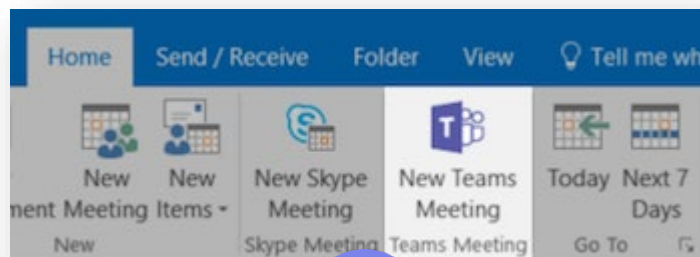
To enable this feature, select 'Private' from the 'Tags' group when you create a new meeting or an appointment.





# SCHEDULE A TEAMS MEETING

To schedule a meeting, open Outlook and switch to the calendar view.



Click New Teams Meeting at the top of the view.



Add your invitees to the To field—you can even invite entire contact groups (formerly known as distribution lists). Add your meeting subject, location, start time, and end time. Then click Send.

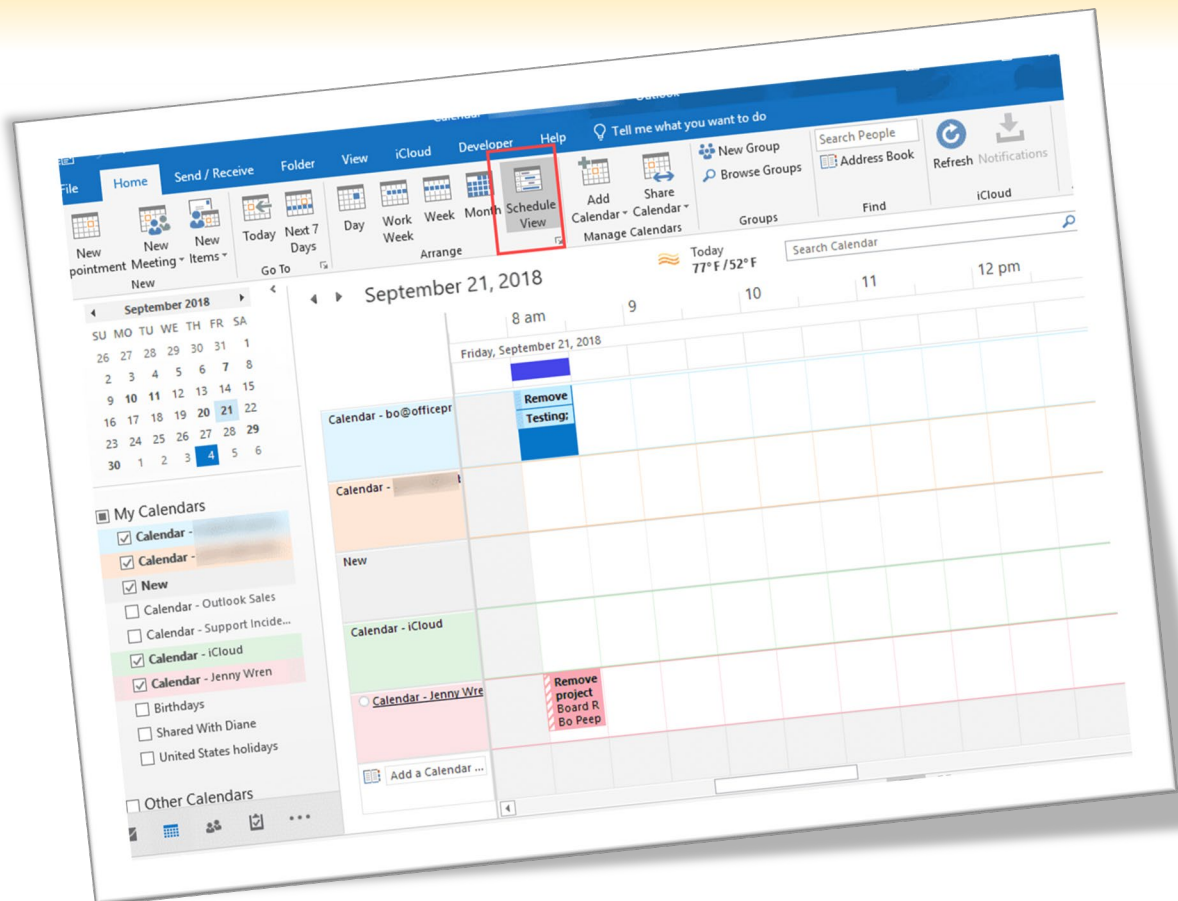


You can also invite people from outside your organization from Outlook. Just be sure to add them as guests before the meeting starts or they will have to join anonymously.





# HOW TO USE SCHEDULE VIEW



Select the calendars you want to display.



In the "Arrange" group in the "Home" tab, click "Schedule View."



To change schedule view default settings



Outlook will default to showing your calendars in schedule view when you have 5 or more calendars displaying at one time. If you would like to be able to view more calendars without schedule view or to turn off this feature, you can change this default in the Options menu.





# HOW TO ADD A CALENDAR



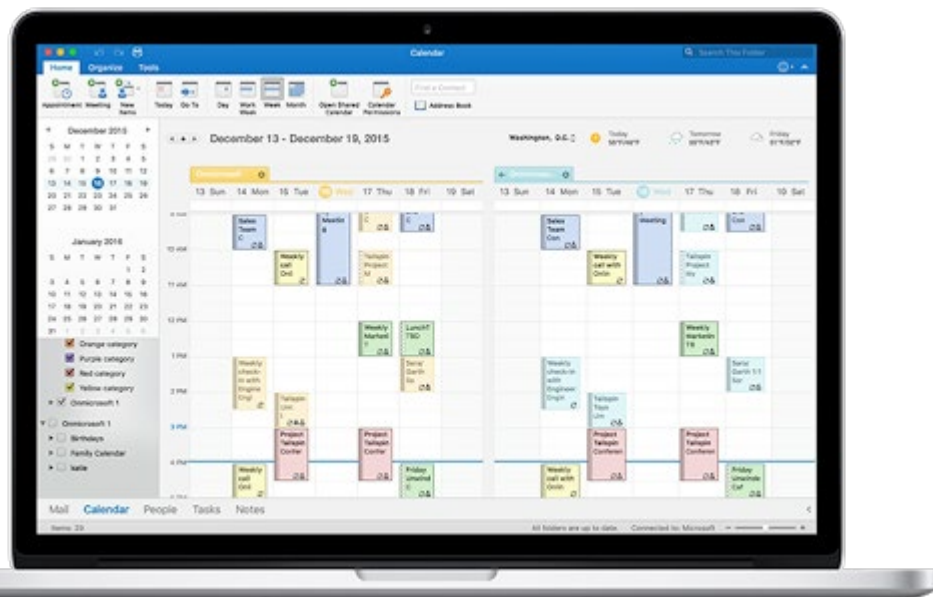
Go to Add Calendar



Create New Blank Calendar

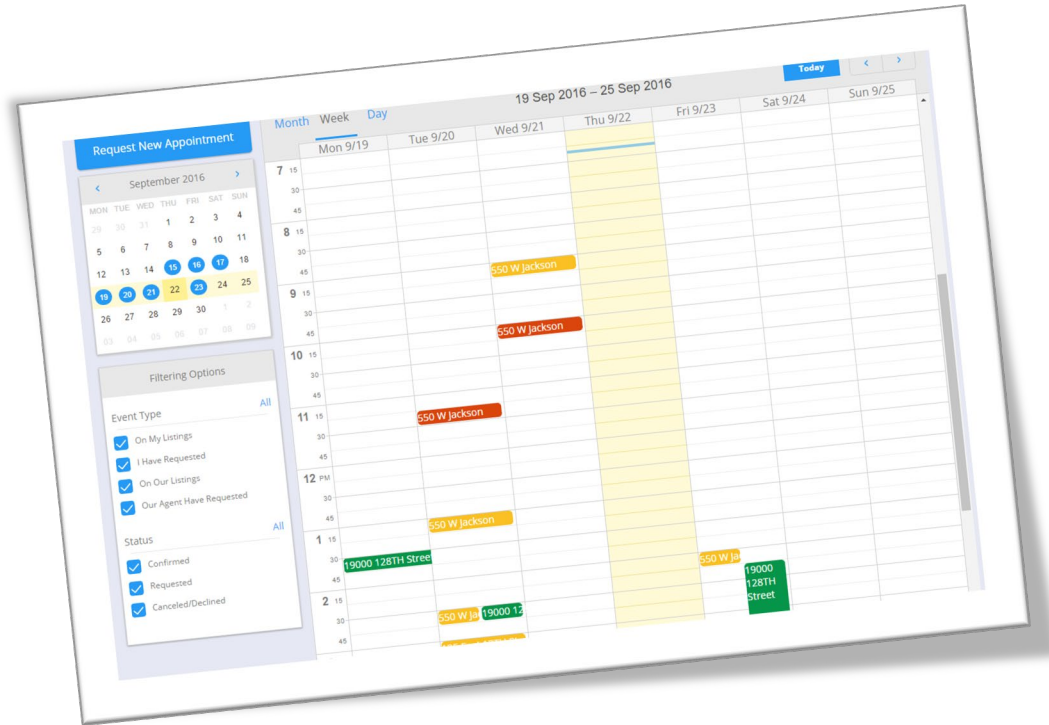


Name your new calendar





# TURN AN OUTLOOK EMAIL INTO AN OUTLOOK CALENDAR APPOINTMENT



Click on the email you want to convert to a Outlook calendar appointment.



Holding down the left mouse key, drag the email to your Calendar folder and drop it.



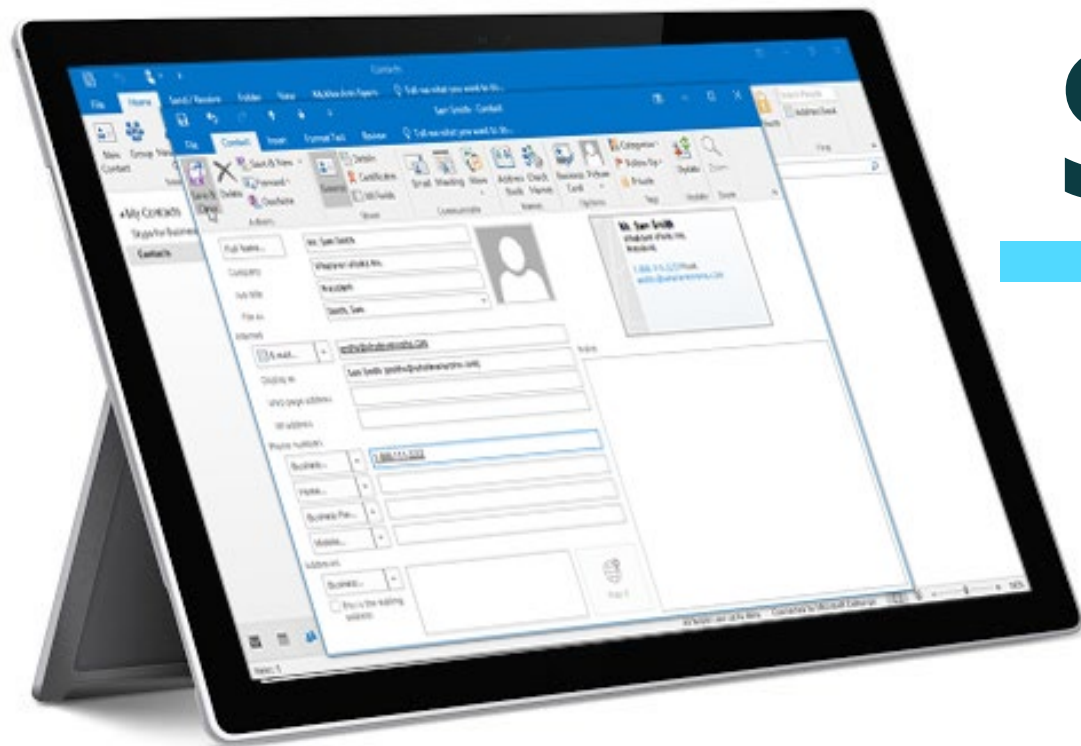
The new calendar appointment dialog will appear with the email subject in the appointment Subject line. Edit the appointment with information you want...



Once you have the appointment information set the way you want, click the Save and Close button.







# SECTION 03

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# CONTACTS



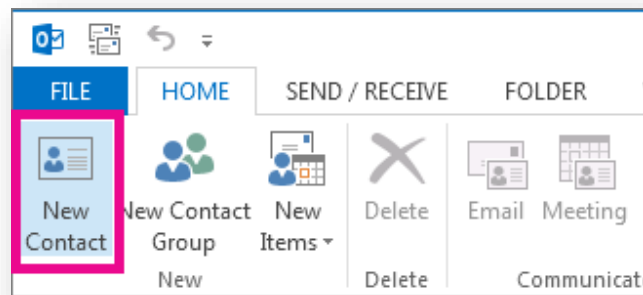




# HOW TO CREATE CONTACTS



Click People at the bottom of the screen.

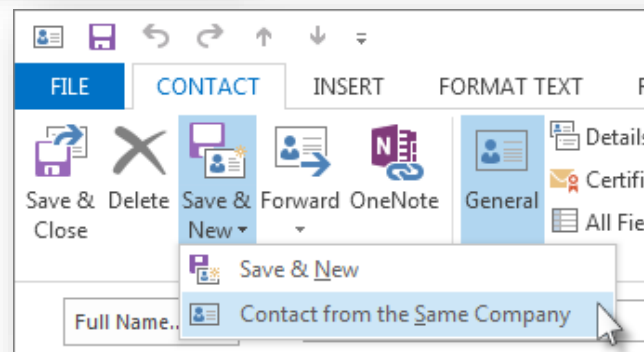


From the File menu, select New Contact or press Ctrl+N.

Tip:

To create a contact from another Outlook folder, press Ctrl + Shift + C. Enter a name and any other information that you want to include for the contact. If you want to immediately create another contact, choose Save & New (this way, you don't have to start over for each contact).

TIP: To add another contact from the same company, choose the down arrow next to Save & New, and then choose Contact from the Same Company.



When you're done entering new contacts, choose Save & Close.



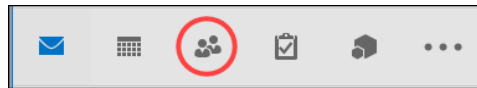


# HOW TO CREATE A NEW CONTACT GROUP



On the navigation bar, click People

Note: You can find People in one of two places on the Navigation bar.



If you're using the compact Navigation bar, click the People icon.



If you're using the expanded Navigation bar, click the word People.



Under My Contacts, select the folder where you want to save the contact group. Usually, you'll select Contacts.



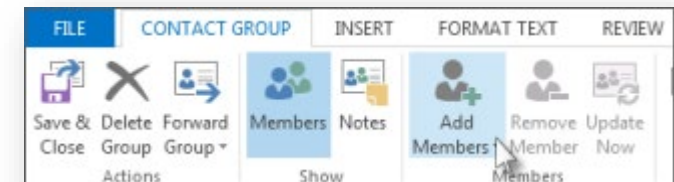
On the Ribbon, select New Contact Group.



Give your contact group a name.



Click Add Members, and then add people  
From your address book or contacts list.



Note: To add someone who is not in your address book or contacts, select New E-mail Contact.



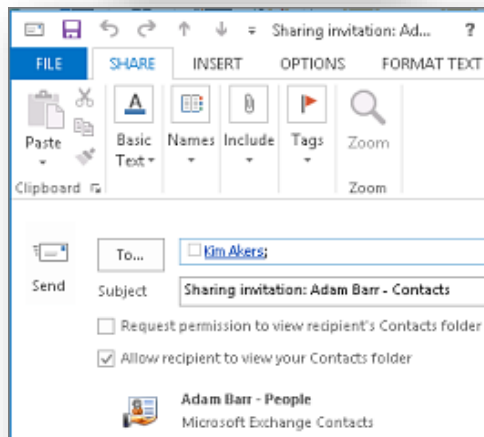
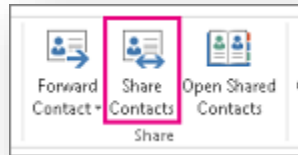
Click Save & Close.





# HOW TO SHARE CONTACTS WITHIN YOUR ORGANIZATION

The default **Contacts** folder in Outlook is created in each Outlook profile. This folder can't be renamed or deleted. You might have additional contact folders. You can share any of these folders by doing the following:



In **People**, in the folder pane, click the contact folder that you want to share with a person in your organization.



Click **Home**. Then, in the **Share** group, click **Share Contacts**.



In the **To** box, enter the name of the recipient for the sharing invitation message. If you want to, you can change the **Subject**.



If you want to, request permission to view the recipient's default **People** folder. To do so, select the **Request permission to view recipient's Contacts** folder check box.





# HOW TO SHARE CONTACTS WITHIN YOUR ORGANIZATION

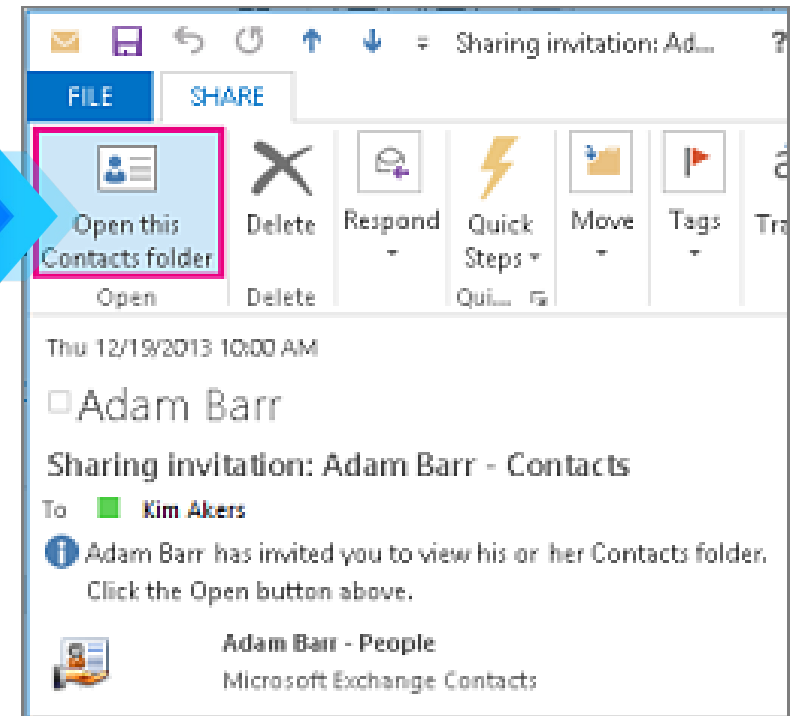
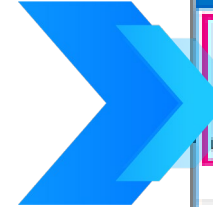
**Note:** If you want to request access to a contacts folder other than the recipient's default **People** folder, you must send an email message that asks for permissions to that particular folder. This option only requests access to the recipient's default **People** folder.



In the message body, type any information that you want to include, and then click **Send**. Review the confirmation dialog box, and then if correct, click **OK**.



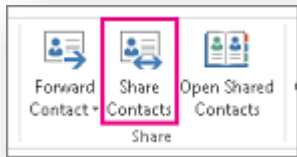
The person in your organization receives the sharing invitation in email, and clicks **Open this Contacts folder**.



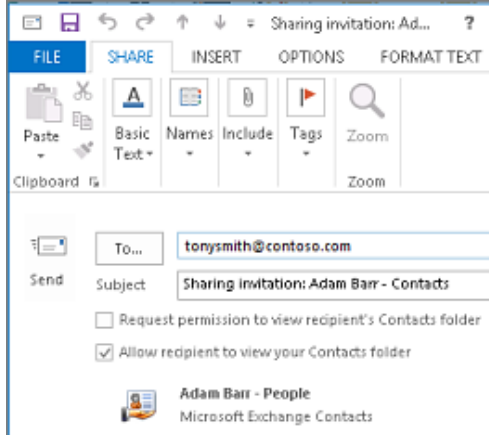


# SHARE WITH SPECIFIC PEOPLE OUTSIDE YOUR ORGANIZATION

The default Contacts folder in Outlook is created in each Outlook profile. This folder can't be renamed or deleted. You might have additional contact folders. You can share any of these folders by doing the following:



In People, in the folder pane, click the contact folder that you want to share with a person outside your organization.



Click Home. Then, in the Share group, click Share Contacts.



In the To box, enter the name of the recipient for the sharing invitation message. If you want to, you can change the Subject.





# SHARE WITH SPECIFIC PEOPLE OUTSIDE YOUR ORGANIZATION



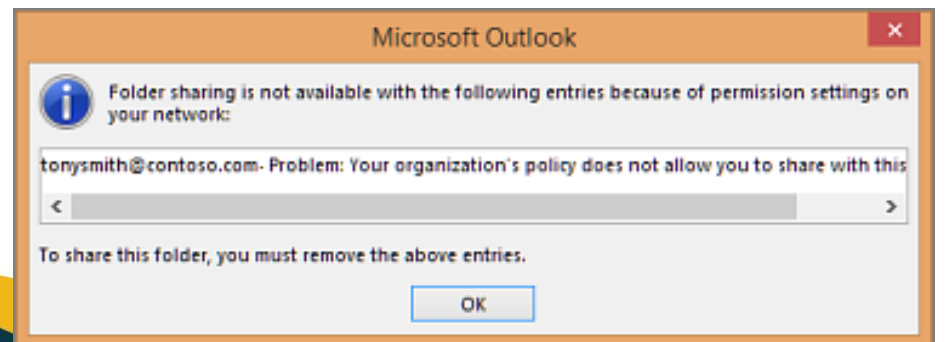
If you want to, request permission to view the recipient's default People folder. To do so, select the Request permission to view recipient's Contacts folder check box.

**Note:** If you want to request access to a contacts folder other than the recipient's default People folder, you must send an email message that asks for permissions to that particular folder. This option only requests access to the recipient's default People folder.



In the message body, type any information that you want to include, and then click Send. Review the confirmation dialog box, and then if correct, click OK.

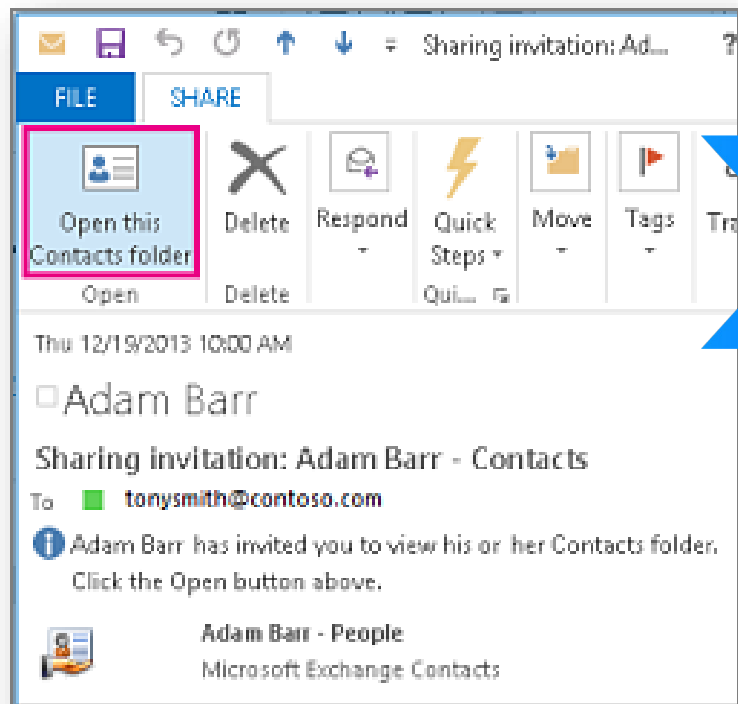
If the following error displays when you try to send the sharing invitation, sharing contacts with people outside of your organization is not supported by the sharing policy for your organization. Only an admin in your organization can change the sharing policy for your organization. For more information, see the end of this section.







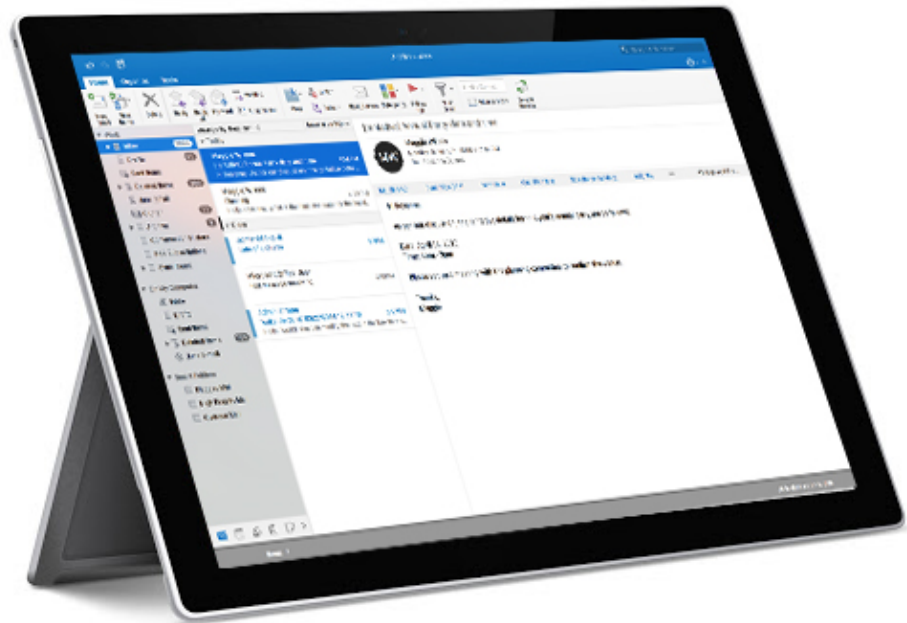
# SHARE WITH SPECIFIC PEOPLE OUTSIDE YOUR ORGANIZATION



The person outside your organization receives the sharing invitation in email, and clicks **Open this Contacts folder.**

If you receive an error when you try to share your contacts with someone outside your organization, contact the person that manages your email account.





# SECTION 04

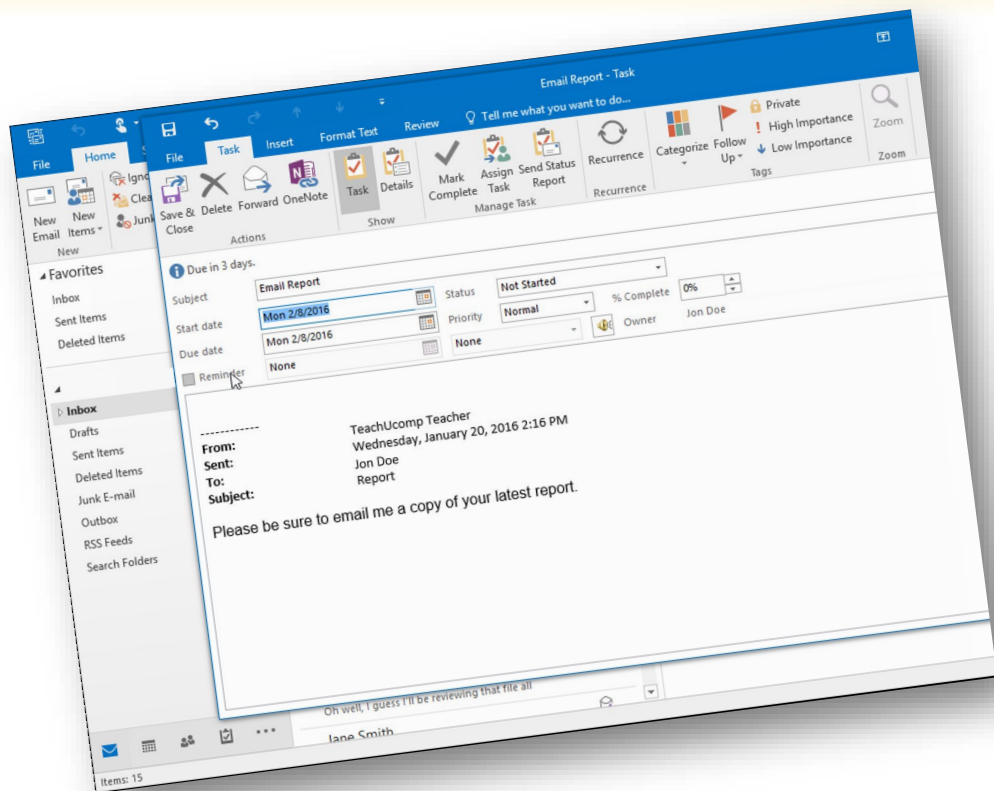
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## CREATE TASKS & TO DO ITEMS





# HOW TO CREATE A TASK



Select New Items > Task or press Ctrl + Shift + K.



In the Subject box, enter a name for the task. It's best to keep the name short and then add the details in the task body.



If there's a fixed start or end date, set the Start date or Due date.



Set the task's priority by using Priority.



If you want a pop-up reminder, check Reminder, and set the date and time.



Click Task > Save & Close.





# CREATE A TASK FROM AN OUTLOOK ITEM

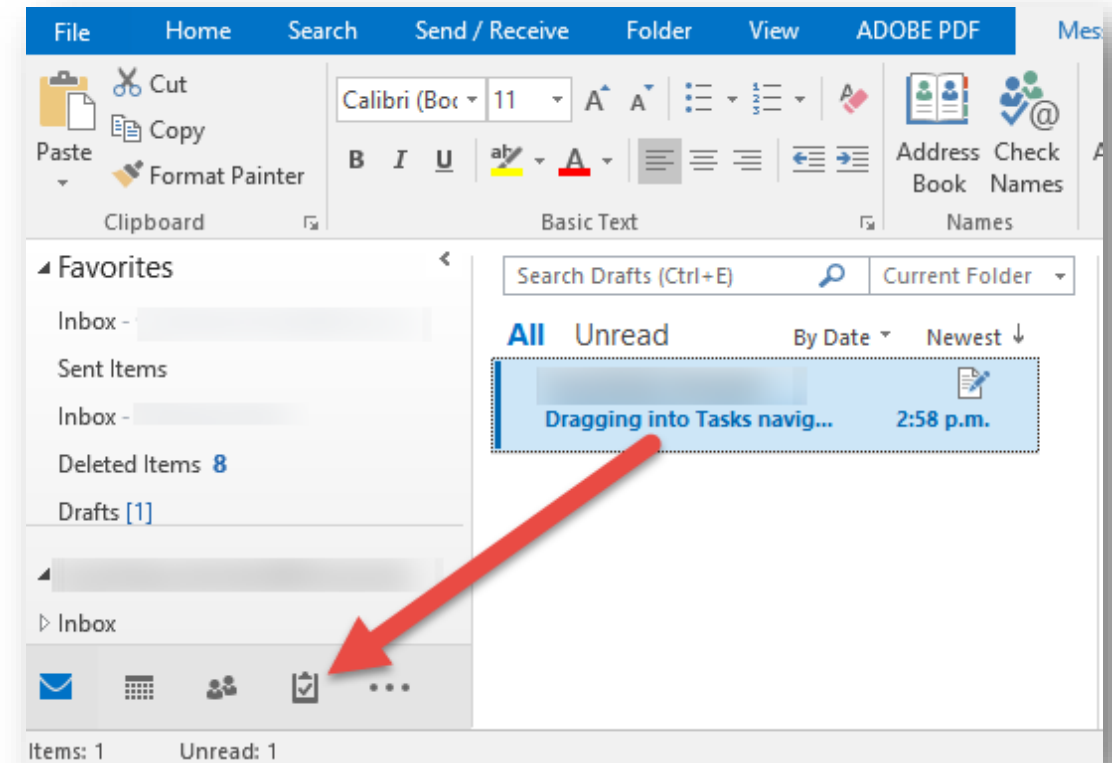


Drag an email message to the To-Do Bar



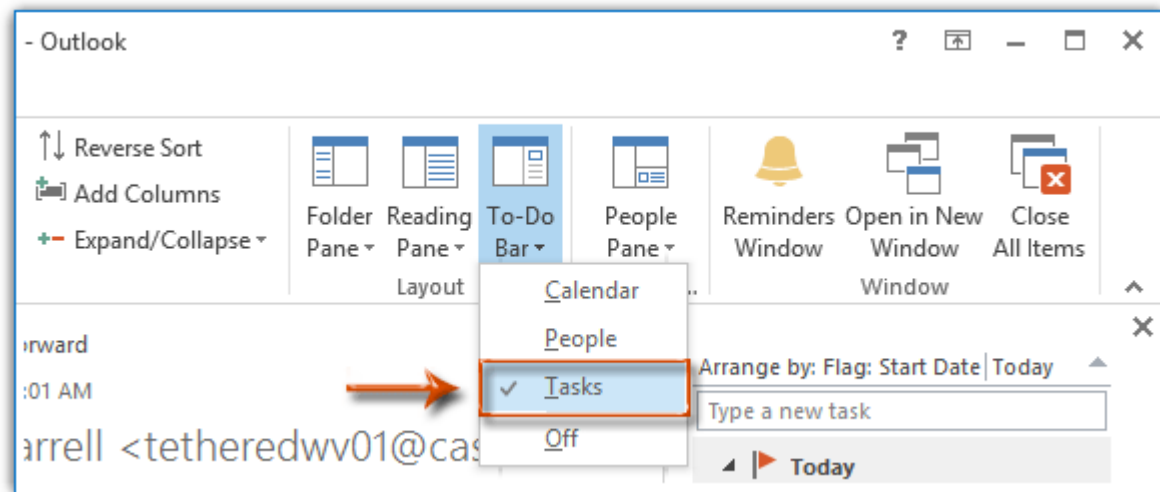
Drag an item to the Tasks icon in the Navigation Pane.

**Tip:** To add the item as an attachment to a new task instead of pasting the text into the task body, right-click the item and drag it to the task list, and then click Copy Here as Task with Attachment.





# CREATE A TASK FROM AN OUTLOOK ITEM



**Tip:** To turn on and show Tasks in the To-Do Bar, on the View tab, in the Layout group, select To-Do Bar and select Tasks.



In the To-Do Bar, select the Type a new task box, and then enter the task description. Press **ENTER** to finish. The task appears in your To-Do list with today's date.

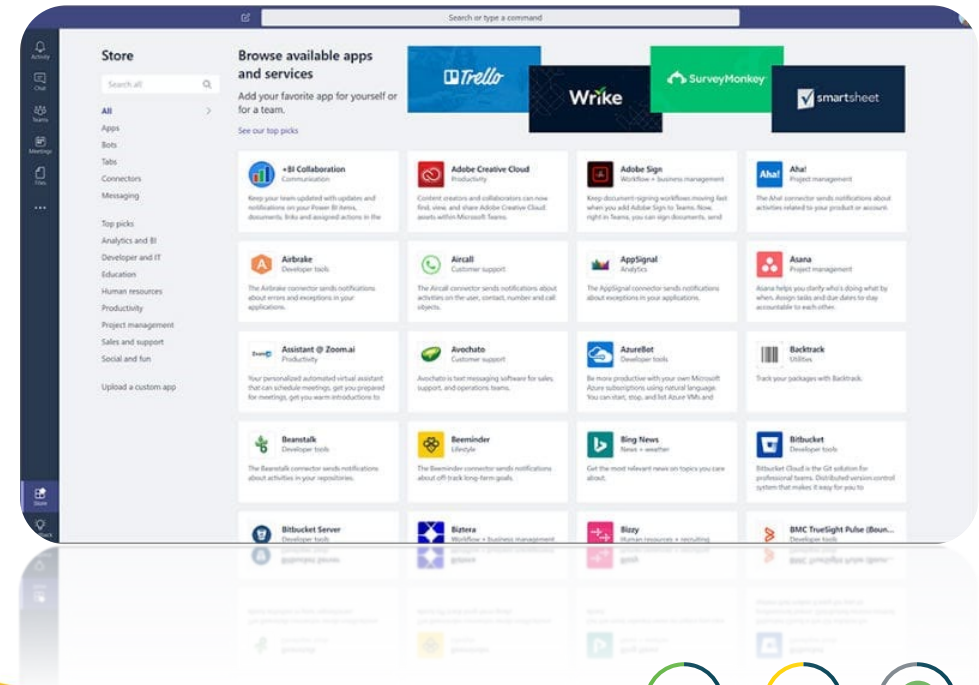


In the To-Do Bar, double-click the Type a new task box to open a new task window. You can enter more detail about the task.



# IS THERE AN APP FOR THAT?

Just like most of the Microsoft 365 suite of products, there is an app for MICROSOFT OUTLOOK that fully integrates with your Microsoft 365 environment





A man with a beard, wearing a blue polo shirt, is shown in profile, looking at a computer monitor. He is in a server room or data center, with multiple computer monitors and server racks visible in the background. The image has a blue tint and a semi-transparent overlay.

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