

Setup Guide

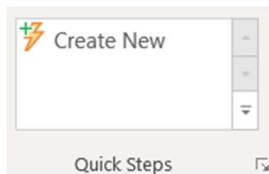
For Microsoft Outlook for Windows

Creating Quick Steps for Email

Quick Steps allow you to complete two steps simultaneously inside of your email inbox. Once you learn how to create quick steps to process your mail, you can create custom steps based on your workflow or need.

Create a Quick Step for Task and File

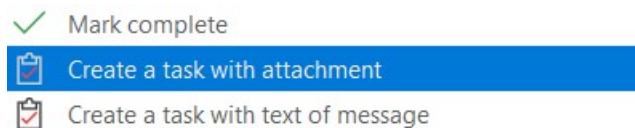
1. Go to Inbox > Home Tab.
2. Find Quick Steps in ribbon.
3. Select Create New from the Quick Steps box or drop-down menu.



4. Name Quick Step Task and File.



5. Choose Create task with attachment as the action.



6. Click Add Action button.
7. Select Move to folder > Always ask for folder.



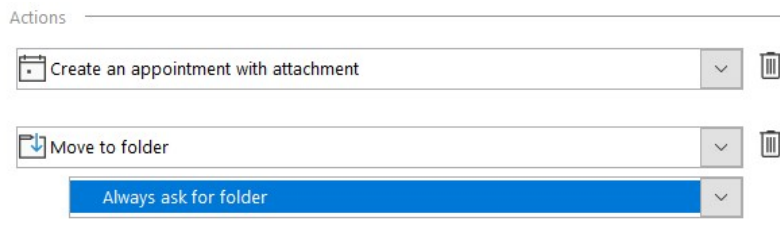
8. Choose a Shortcut key.
9. Click Finish.

Task and Delete – Useful if you wish to create a task and move the email to deleted items. To create a Quick Step for Task and Delete, follow the steps above, but name it Task and Delete and choose Delete message instead of Move to folder in step 7.



Calendar and File/Delete – If you have an email you wish to create as a calendar appointment, then retain the message (or delete it). To create a Quick Step for Calendar and File, follow the steps above, but name it Calendar and File.

1. Navigate to the Appointments section and choose Create an Appointment with Attachment
2. Click Add Action button.
3. Select Move to folder > Always ask for folder.
4. Or choose Delete message if you wish to delete the email



Reply and Delete – This is helpful if you need to provide a quick reply or set up a quick meeting, then delete the message. To create a Quick Step for Reply and Delete, follow the steps above, but name it Reply and Delete.

1. Navigate to the Response section and choose Reply or Reply All or Reply with Appt
2. Click Add Action button.
3. Select Delete Message



Move to folder – For message you wish to move to specific folders. To create a Quick Step for Move to folder, follow the steps above, but name it Move to folder.

1. Click Add Action Button
2. Select Move to folder > then Always ask for Folder

