Outlook 2013 Email Management Tips

Part 3 of 3

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Get Organized Using Quick Steps

A question always pops into my mind every time I file an email—"Will I be able to find it when I need it"? This is one reason why email piles up in our Inbox—after all, it is a folder, isn't it? Filing emails in a precise location, whether in Outlook folders or a document management system, can be a daunting task. My previous article tips showed how to delete email and remove large attachments you don't need—which you can read here: Article Tip #1 and Article Tip #2. This article focuses on using Quick Steps to help safely automate the process of filing email.

Have you ever dragged and dropped an email accidentally to the wrong folder? If you happen to catch it, you can immediately press Ctrl+Z to bring it back. But when you don't catch it, it becomes misfiled, which is as good as deleted when trying to figure out where it landed. Quick Steps can help!

Quick Steps were introduced in Outlook 2010, and today, I heavily rely on them in Outlook 2013 for bulk email filing as well as setting up meeting invitations with all of the fields prepopulated—comes in handy when setting up regularly scheduled team meetings.

Say you're working on a new project or matter which will involve volumes of email exchanges over several months. Create a Quick Step for that project right away and save time later when filing and retrieving email.

Create a Quick Step

1. On the **Home** tab, in the **Quick Steps** group, click **Create New**.

2. In the **Name** box, type a short but descriptive name.
3. Under **Actions**, select **Move to Folder**, and click the drop-down arrow next to **Choose an Action**, and select **Move to Folder**.
4. Click the drop-down arrow next to **Choose Folder**, then select the folder.
   Note: The icon in the upper-left corner changes to a folder with a blue arrow above it. You can click the icon button to choose a different icon.
5. Click **Add Action** and select **Mark as Read** from the drop-down list.
6. Under **Optional**, select a shortcut key and type a tooltip, if desired.
7. Click **Finish**.
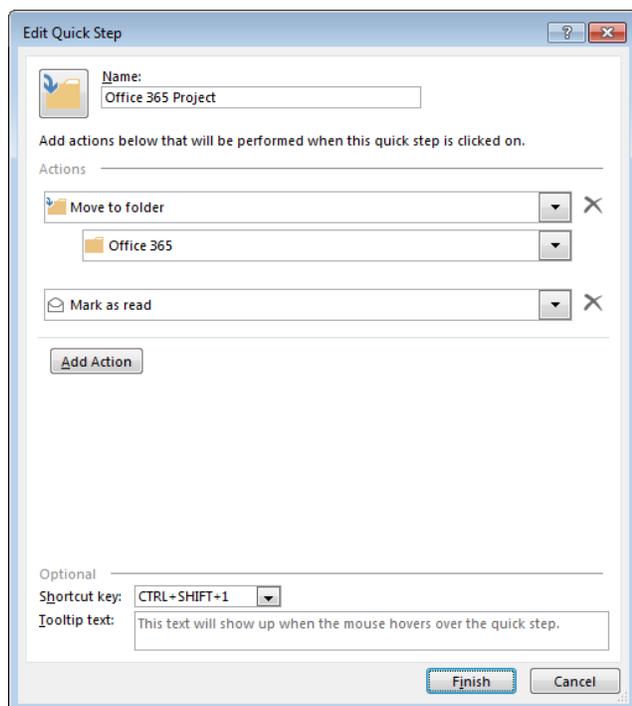
8. Your new Quick Step will appear as the first button in the Quick Steps group.

Tip: Click the Quick Steps dialog box launcher to open the Manage Quick Steps dialog box to rearrange the order, edit, or to delete Quick Steps.

Move Email to a Folder Using a Quick Step

1. Select a message and click the Quick Step you created—or try out the new keyboard shortcut, if you assigned one.
2. The email has been moved to the specified folder and is marked as Read.

Tip: When using Conversations view, file several messages in the same thread by clicking on the conversation header, then click the Quick Step. All messages in that conversation are filed at once.
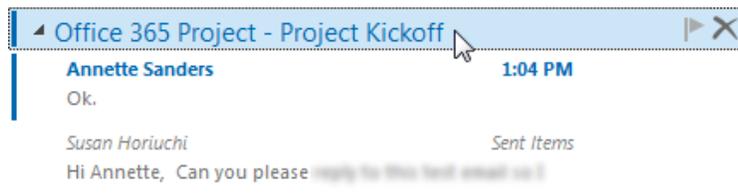
Note: You cannot undo the Quick Step action. Instead, right-click on the Quick Step, and select **Go to [folder name]**. This is a quick method to get to the folder and either apply another Quick Step or manually move the email(s) to the correct folder.
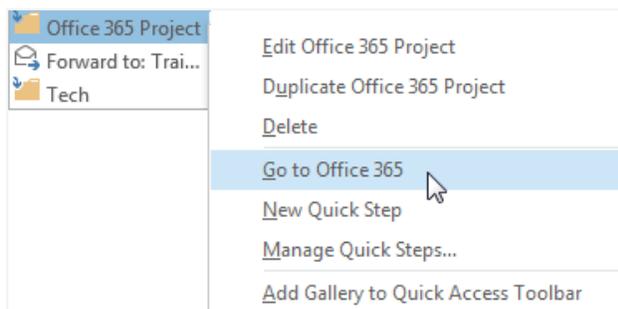
Happy organizing! To read back issues, click to download Article Tip #1 and Article Tip #2.

About the Author

Susan Horiuchi is VP of Training and Professional Services at PayneGroup. The company has authored 13 books on Microsoft Office, develops globally used products and offers training and professional services worldwide.