

Organizing Email Chaos With Dr. Monica Seeley & Melissa Esquibel, MCT, MOSM

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Organization Strategies

Managing viewsFolders

Categories

Rules (Outlook) and Filters (Gmail)

Basic rule in Outlook
What can you do with Advanced rules
Filtering rules in Gmail
Labels vs. Stars

See Emails from Important People Quickly

- 1. Right click on the person's name. From the drop-down menu select Create Rule.
- 2. From the Rules wizard, click on Advanced Options.
- 3. From the Step 1 box, click on the box with the person's name.
- 4. Click Next
- 5. In the next box click on the relevant action eg Display a Desktop Alert. Click next/Next/Finish.

	Create Rule		×	
	When I get email with all of th	ne selected conditions	5	
	From Lucy Brazier			
	Subject contains LIVE, G	lobal - Final line up! 5	2 speakers 2 Days 48 hour	
	Sent to me only	iobai - Finar nine ap. 5.	×	
	-		×	
	Do the following			
	Display in the New Item Ale	ert window		
	Play a selected sound:	Windows Notify Em	Browse	
	Move the item to folder:	Lucy B	Select Folder	
	-			
		OK Cancel	Advanced Options	
	Lanna and L			
Rules Wizard				
Kules Wizard		×	Rules Wizard	×
Which condition(s) do you want to check?		3		
Step 1: Select condition(s)		2	What do you want to do with the message?	
from Lucy Brazier	^	1	Step 1: Select action(s)	
with Access to replays website in the subject			permanently delete it	^
sent to Lucy Brazier			forward it to people or public group	
with Access to replays website in the subject or	body		forward it to people or public group as an attachment	
through the <u>specified</u> account sent only to me			redirect it to people or public group	
where my name is in the To box			have server reply using a specific message	
marked as importance			reply using a specific template flag message for follow up at this time	
marked as sensitivity			clear the Message Flag	
flagged for action			clear message's categories	
where my name is in the Cc box			mark it as importance	
where my name is in the To or Cc box			print it	
where my name is not in the To box			play a sound	
with specific words in the body			mark it as read	
with <u>specific words</u> in the message header with <u>specific words</u> in the recipient's address			stop processing more rules	
with specific words in the recipient's address		2	display a specific message in the New Item Alert window display a Desktop Alert	
assigned to category category	~		apply retention policy: retention policy	~
Step 2: Edit the rule description (click an underlined	(Step 2: Edit the rule description (click an underlined value)	
Apply this rule after the message arrives	(value)	1)	Apply this rule after the message arrives	
Apply this rule after the message arrives			from Lucy Brazier	
			display a Desktop Alert	
		2		
		-		_
Cancel < Back	Next > Finish		Cancel < Back Next > Finis	h
cancer < back	FINISH			

What rules will you create?

Gmail: Stars vs. Labels

- ▲Stars are a visual marker with metadata.
- ▲Stars work on individual messages in a conversation
- ▲Labels apply to conversations
- ▲Labels act like folders
- ▲Filters can apply to either BUT one kind of star only

Gmail: Stars: How to

▲Click the star

▲Use a filter to star

▲Setting up custom stars, then click, click, click, click

	Settings	
	General Labels Inbox Accounts and Import Filters and Blocked Addresses	
	Forwarding and POP/IMAP Add-ons Chat and Meet Advanced Offline Themes	
\leq	Stars: Drag the stars between the lists. The stars will rotate in the order shown below when To learn the name of a star for search, hover your mouse over the image.	you click
\sim	Presets: 1 star 4 stars all stars	
	In use: \star ★ 🖬 🛧 🛧 🖬 😰	
	Not in use: 📩 👖 😕 !	

Labels: How to

- ▲Labels = Folders
- ▲Labels area also categories, with multiples possible
- ▲Label as...

▲Setting up a Filter

K Reply	Label as:	<	Social 1,751
κ Reply all	Case Tests	Q	a Label color
 Forward Forward as attachment 	"Case Tests" (create new)		Updates a Laber Color Forums In label list
Archive	: Meeting	Ē 1	Promotions 6,7 🗸 Show
Delete			1 [Imap]/Drafts Show if unread
Mark as read			Amazon foronational Hide
 Mark as unread Snooze 	t: Test Recurring Meeting @ Weekly f	. 🖻	Case Tests
🖉 Add to tasks	Recurring Meeting @ Weekly from 10	. 🖻	► Poloted Items ✓ Show
Move to >	es 2017-06-08 12:41 GMT-05:00 Melis	e	Google Play Hide
Label as		e	Google Play Email

Filters: How to

- ▲Search for messages
- ▲Create filter
- ▲Assign action
- ▲Also apply filter to matching conversations = Run now

					Q	from:netflix -in:chats	×		P	
Q netflix	×	Q	®		÷	When a message arrives that matches this	search:			
From	netflix					Skip the Inbox (Archive it)				
То						Mark as read				
Subject						Starit				
Has the words				•		Apply the label: Netflix -				
Doesn't have						Forward address				
Size	greater than		MB			Delete it				
Date within	1 day					Never send it to Spam				
Search	All Mail					Send template: Choose template *				
Has attach						Always mark it as important				
	bont include chats					Never mark it as important				
			Create filter	earch		Color 1				
			1 I IA	(Also apply filter to matching conversations	🕨 Ru	n n	ow	
					0	Learn more				Create filter

Quick Steps vs. Templates

Quick Steps
 No rich text
 No attachments
 One click operation

Templates
 Anything you can put in an email message
 A few more clicks to use

Email Templates & Quick Steps

▲Doing the hard work once





Mail Merge

▲Sending the same message to multiple people in Outlook

▲What about Gmail?

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	Mail Merge with Attachments - G Suite Marketplace								
	Go to the Google Sheet > Add-ons > Mail Merge with Attachments > Show Email Quota to								
	know your daily								
	3 days ago - ★★★★★ Rating: 4.3 - 2,571 votes								
	gsuite.google.com > marketplace > app > yet_another_ma								
	Yet Another Mail Merge (YAMM) - G Suite Marketplace								
	The best and easiest mail merge tool for Gmail To get started, simply: > install the add-on								
	from the G Suite								
	Aug 31, 2020 - ★ ★ ★ Rating: 4.8 - 18,170 votes								

Mail Merge in Outlook

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To save this contact data for future use or reference, specify a file name.							
Permanent file:	Browse						
Merge options							
Document type: Merge to:							
Form Letters V New Document V							
OK	Cancel						

Conditional Formatting Steps

View tab, Current View group, View Settings buttonConditional Formatting button

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oName it	Conditional Formatting	
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Inbox Views

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Don't use email

▲Not everything should be an email ▲Instead of email...?



Turning off Notifications in Trello



What you say when you say Nothing

Priorities

- ▲What do you want?
- ▲Emotional messages
- ▲Ending the conversation

Resources

▲<u>Watch & Learn</u> ◦ https://melissaesquibel.com/watch-learn

▲<u>ExecSecTech</u>

ohttps://www.execsectech.com/

▲<u>MESMO website</u>

ohttps://www.mesmo.co.uk/

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