



Smart Assist Donkey Tip

Create a Quick Step to Streamline Repetitive Outlook Tasks

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Let me kick off our first ever Smart Ass-ist post with a solution to help keep your Outlook email folders tidy.

Here's a Quick Step solution to streamlining your folder maintenance. I like to be able to see if I have new emails with a quick look at my Outlook folders. We all get a donkey load of emails so the number of "Unread" emails can really build up. You can mark emails as "Read" and delete them with one (or maybe two) quick clicks or one keyboard shortcut. This way the "Unread" numbers drop away making the email count represent only new new emails or what you are interested in.

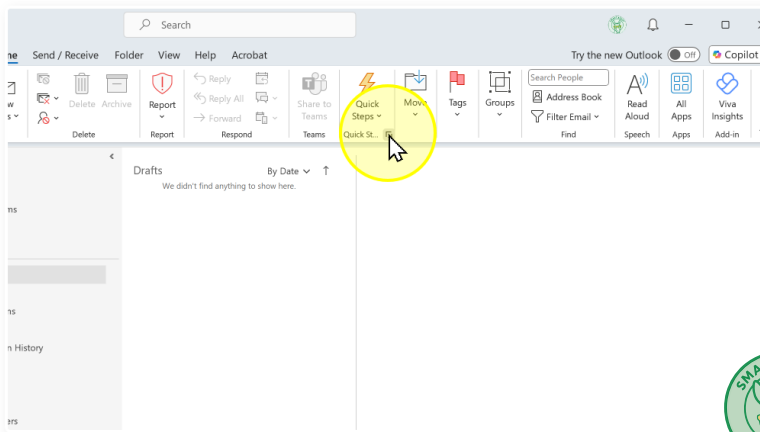
Let's walk through the process of using a Quick Step to delete unwanted emails and mark them as "Read".

TECHNICAL NOTE

These instructions are for Classic Outlook. If you are a New Outlook user, the steps will be similar but not exactly the same. If you have difficulties, shoot us an email at inquiry@smartassistau.com and we will make it work for you.

First, let's create the Quick Step. You only have to go through these simple steps once.

1 Click "Manage Quick Steps..."



Step 1

After clicking on any folder in Outlook, go to the standard ribbon and click on the dialog launcher in the bottom right corner of the Quick Steps Group.



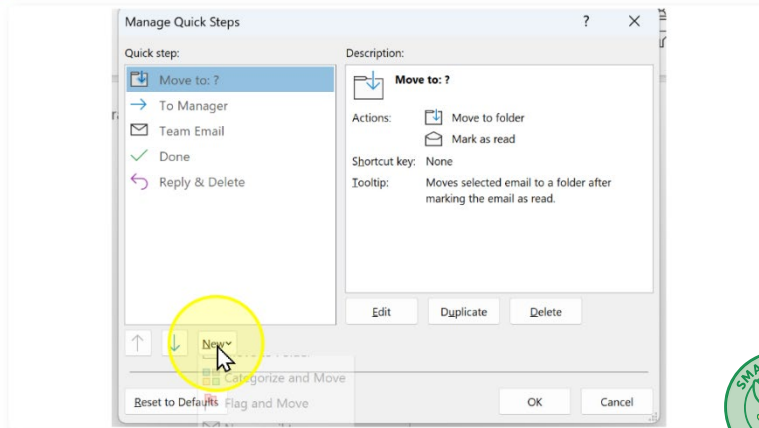


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2 Click "New"

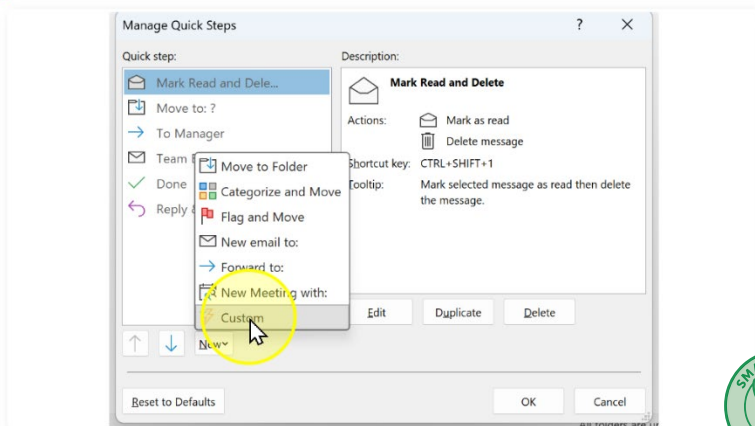


Step 2

Click on the “New” button of the Manage Quick Step window.



3 Click "Custom"

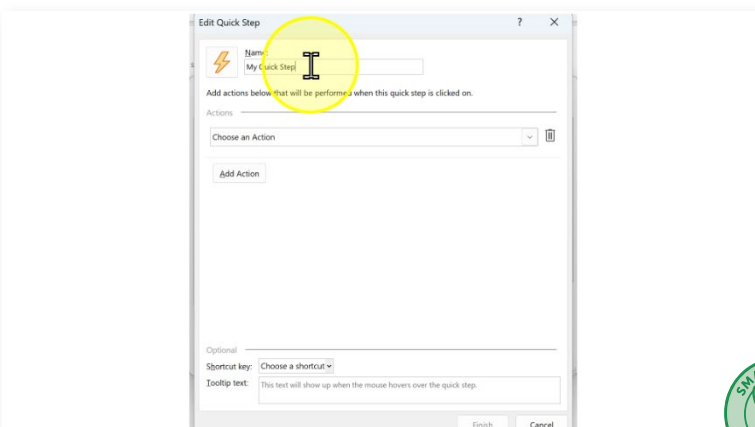


Step 3

Click on the “Custom” Option.



4 Click "Name:"



Step 4

Click in the “Name” field to name your Quick Step.

In this case, I named mine “Mark as Read and Delete”.



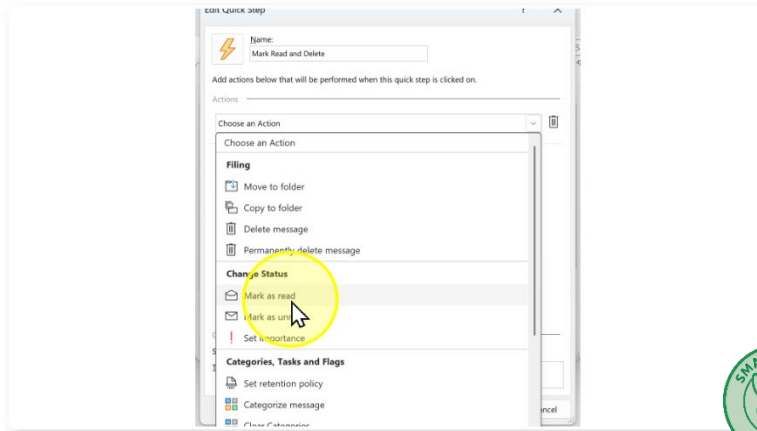


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5 Click "Mark as read"



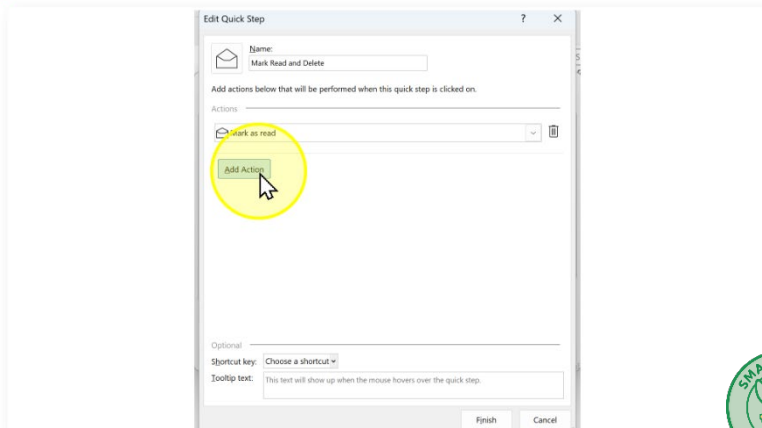
Step 5

Choose your first Action.

Use the pull-down menu to choose "Mark as Read".



6 Click "Add Action"

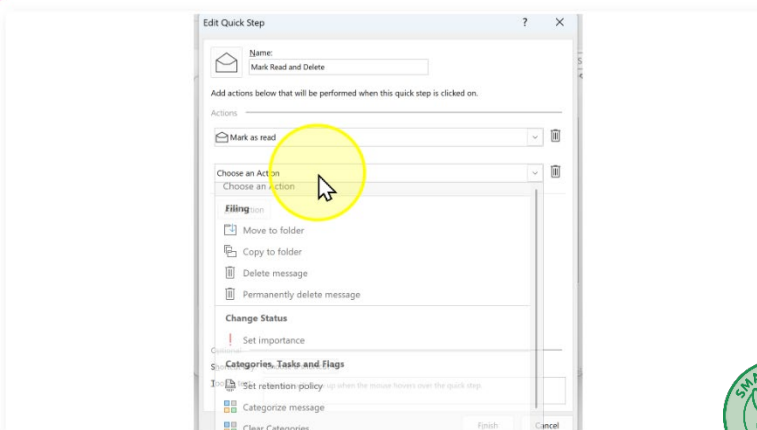


Step 6

Add your second Action by clicking on the "Add Action" button.



7 Click "Action"



Step 7

Click "Action" to open pull-down selection menu.



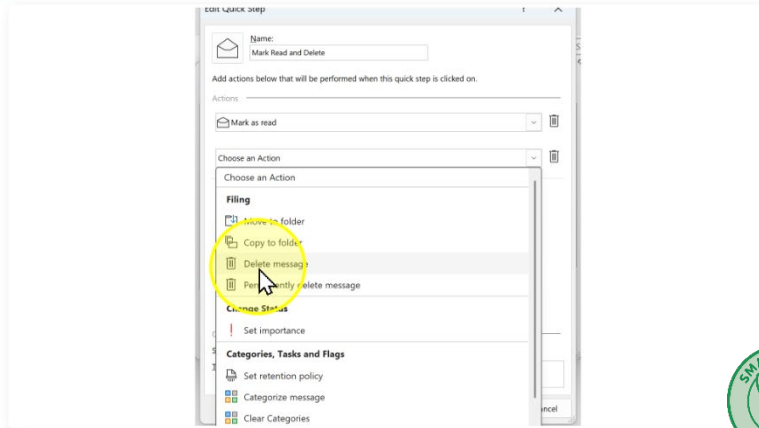


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8 Click "Delete message"

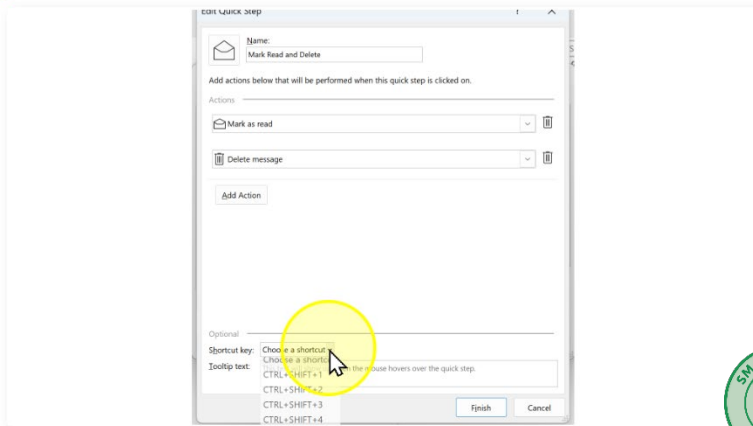


Step 8

Select "Delete Message" from the pull-down menu.



9 Click "Choose a shortcut."

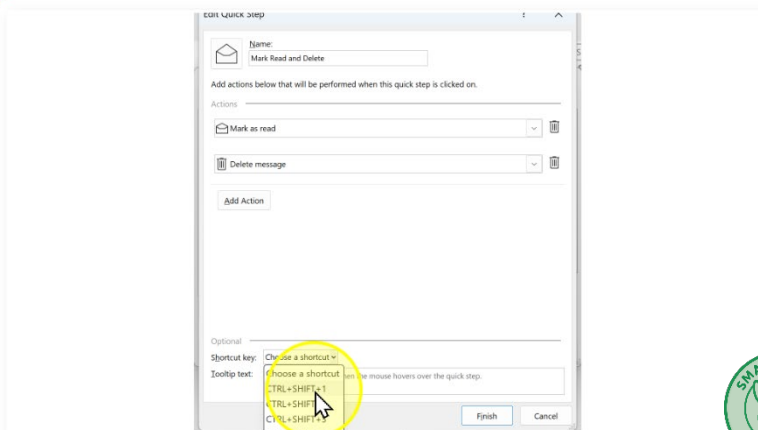


Step 9

Click "Choose a shortcut"



10 Click "CTRL+SHIFT+1"



Step 10

Select the option you want. I chose "CTRL+SHIFT+1".



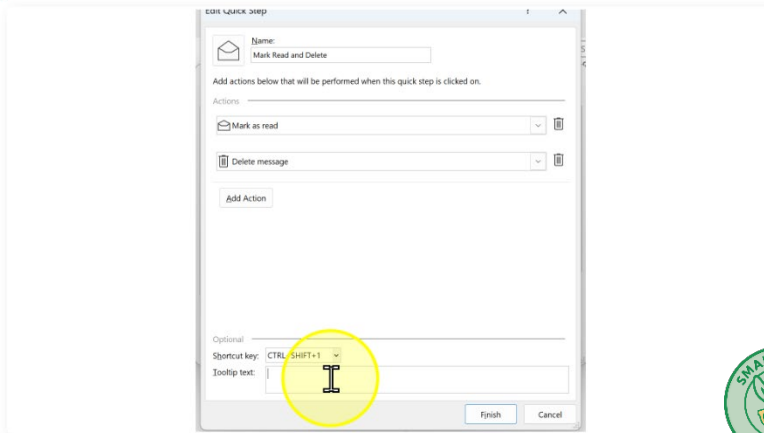


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11 Click "Tooltip text"



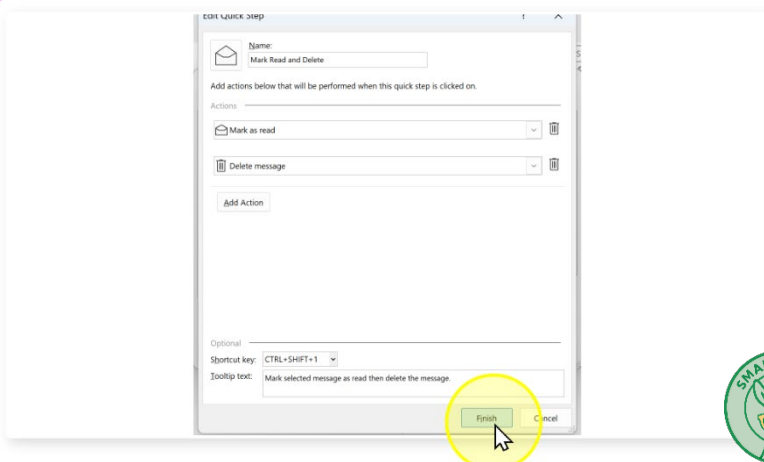
Step 11

Optional – If you are interested in adding a Tooltip to remind the user of the function of the Quick Step...

Click in the “Tooltip Text” box and add the text you want. I added “Mark a message as read then delete the message.”



12 Click "Finish"

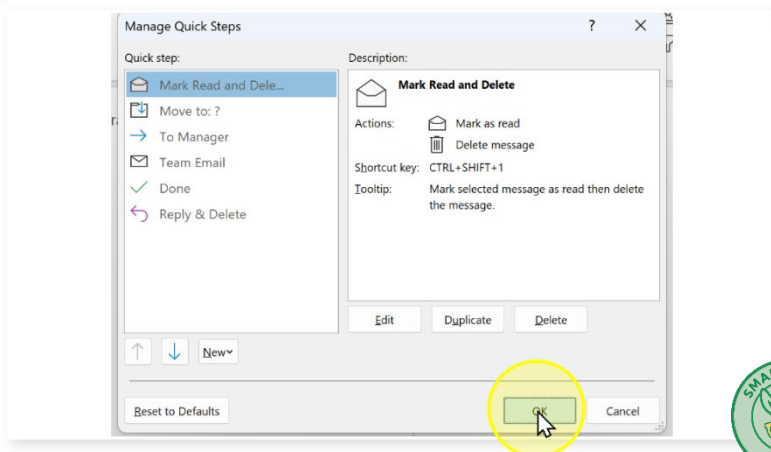


Step 12

Click “Finish” to close the dialog box and save your new Quick Step.



13 Click "OK"



Step 13

Use the up arrow to move your new Quick Step to the top of the list. Click “OK” to close the “Manage Quick Steps” dialog box.





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Now, to activate the Quick Step you just created, first, you must select the message or messages to which you want to apply the Quick Step. From there, there are at least two options to activate the Quick Step.

Option 1 ----- Use the Shortcut Key you created. In the example, I chose “CTRL-SHIFT+1”.

Option 2 ----- Go to the standard ribbon and click on the Quick Step. If you moved your new Quick Step to the top of the list as shown in Step 13, it shows by default. If it does not show by default, click on the pull-down arrow to open the selection pane and choose the Quick Step you want to actuate.

Thanks for reading our post. For more assistance, please visit our website at www.smartassistau.com or send us an email at inquiry@smartassistau.com. Either way, we will work our donkeys off to help.