

SETTING UP QUICK STEPS IN OUTLOOK

Lawyers can use Quick Steps in Outlook to make processes quicker and more efficient. Several Quick Steps have already been provided to you by default. But there are many others not visible on the home screen, and you have the ability to create new and customized Quick Steps. These instructions are for Microsoft Outlook 2016, but the steps described may be helpful in other email programs.

Customize a Default Quick Step

1. With Microsoft Outlook open, Click the **Home** tab.
2. In the **Quick Steps** group, select the **More** arrow at the side of the Quick Steps box to open **Manage Quick Steps**.
3. In the **Quick Step** box, select the Quick Step that you want to change, and then select **Edit**.
4. Under **Actions**, change or add the actions that you want this Quick Step to do.
5. If you want, in the **Shortcut Key** box, select a keyboard shortcut that you want to assign to that Quick Step.
6. If you want to change the icon for a Quick Step, select the icon next to the **Name** box, select an icon, and then select **OK**.

Create a Quick Step

1. With Microsoft Outlook open, click the **Home** tab.
2. In the **Quick Steps** box, click **Create New**.
3. Type a name for the Quick Step (i.e., Email filing).
4. There are many different options for Quick Step “Actions”, and you can choose multiple actions for the same Quick Step.
5. For example, you could make the first action “Mark As Read,” then add another action such as “Forward,”, and a third action such as “Move to Folder.”
6. When the actions are complete, click **Finish**.

IMPORTANT NOTICES

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