



Microsoft Outlook Cheat Sheet

1. Organizing Your Inbox: Folders, Filters & Rules for Auto-Sorting

Setting Up Folders for Better Email Organization

1. Open Outlook and go to your **Inbox**.
2. Right-click on **Inbox** (or any folder where you want a subfolder).
3. Select **New Folder**, name it (e.g., "Urgent," "Leasing Inquiries," "Purchase Orders").
4. Press **Enter** to save.

Creating Rules for Auto-Sorting Emails

1. Click on **File > Manage Rules & Alerts**.
2. Click **New Rule**.
3. Choose **Move messages from someone to a folder** (or another condition that fits your workflow).
4. Click **Next**, set the sender or subject conditions, and select the folder where emails should go.
5. Click **Finish** to activate.

2. Automating Tasks with Quick Steps

Creating a Quick Step for Repetitive Actions

1. Go to the **Home** tab and find the **Quick Steps** group.
2. Click **Create New**.
3. Name your Quick Step (e.g., "Archive Leasing Emails").
4. Choose an action (e.g., "Move to Folder").
5. Set any additional actions (e.g., Mark as Read, Categorize).
6. Click **Finish** to save.
7. Use the Quick Step by selecting an email and clicking your new action.

3. Creating Recurring Calendar Events

1. Open **Calendar** and click **New Appointment**.
2. Enter event details (e.g., "Monthly Unit Inspections").
3. Click **Recurrence** and set the frequency (daily, weekly, monthly, etc.).
4. Click **OK**, then **Save & Close**.



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4. Task Management: Creating & Assigning Tasks

Creating Tasks & Reminders

1. Click **Tasks** or **To-Do List** in Outlook.
2. Click **New Task** and enter details (title, due date, priority, notes).
3. Set a **Reminder** to receive notifications.
4. Click **Save & Close**.

Assigning Tasks to Team Members

1. Open a task and click **Assign Task**.
2. Enter the recipient's email address.
3. Check **Keep an updated copy of this task on my task list**.
4. Click **Send**.

5. Using Color-Coding for Prioritization

Applying Color Categories to Emails, Tasks & Calendar Events

1. Right-click an email, task, or calendar event.
2. Select **Categorize** and choose a color.
3. Click **New Category** to customize.
4. Use colors for priority levels (e.g., Red = Urgent, Green = Follow-up, Blue = Meeting).

6. Creating "Quick Parts"/Templates for Faster Email Responses

Saving a Frequently Used Email as a Quick Part

1. Open a new email and type the text you want to save.
2. Highlight the text.
3. Click on the **Insert** tab, then **Quick Parts**.
4. Select **Save Selection to Quick Part Gallery**.
5. Name the Quick Part and click **OK**.

Using a Saved Quick Part in an Email

1. Open a new email or reply to an email.
2. Click on the **Insert** tab, then **Quick Parts**.
3. Select the saved Quick Part from the list.
4. The text will automatically be inserted into your email.



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7. Preventing "Reply All" with Encrypt Settings

Stopping Recipients from Using "Reply All"

1. Open a new email and go to the **Options** tab.
2. Click **Encrypt** and select **Do Not Forward**.
3. This will prevent recipients from forwarding or replying all to the email.
4. Send the email as usual.

8. Sending an Email with an Auto-Reminder for the Recipient

How to Include a Follow-Up Reminder in Your Email

1. Open a new email and compose your message.
2. Click on the **Message** tab.
3. Select **Follow Up > Add Reminder**.
4. Check **Flag for Recipients** and choose a reminder time.
5. The recipient will receive an automatic reminder at the specified time.
6. Click **Send** to deliver the email.

Pro Tip: Use these strategies to streamline your workflow and stay proactive in property management. **Be Proactive, Do it Now, Do it Right!**

Keyboard Shortcuts

Go to Calendar	Ctrl + 2	Flag for followup	Ctrl + Shift + G
Go to Mail	Ctrl + 1	Insert file	Alt + N A, F
Reply	Ctrl + R	Search	Ctrl + E or Alt + Q
Reply All	Ctrl + Shift + R	Send/Receive	Shift + F9
Switch view to include today	Ctrl + T	Create new meeting request	Ctrl + Shift + Q
Open selected calendar event	Ctrl + O	Create Appointment	Ctrl + Shift + A

See keyboard shortcuts for Outlook at: <https://go.microsoft.com/fwlink/?linkid=864503>

Outlook Training: <https://go.microsoft.com/fwlink/?linkid=864509>

Differences between desktop, online, and mobile at:
<https://go.microsoft.com/fwlink/?linkid=864504>

