


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 desktop and web-based versions of Microsoft Outlook for Microsoft 365, but the steps described may be helpful in creating client folders in other email programs.

Customize a Default Quick Step

Desktop-based Outlook:

1. With Microsoft Outlook open, click the **Home** tab.
2. In the **Quick Steps** group, select the **More** arrow  at the bottom right corner 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**.

Web-based Outlook:

1. There are no default Quick Steps in web-based Outlook.

Create a Quick Step

Desktop-based Outlook:

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**.

Web-based Outlook:

1. With Microsoft Outlook open, click on the **Settings** icon, which looks like a sprocket and is located at the top-right.
2. Click **View all Outlook settings**. Be sure that **Mail** is selected from the left-hand menu.
3. Click **Quick steps**.
4. Click **+New quick step**.
5. In prompt 1, enter a name for your quick step.
7. In prompt 2, click **Choose an action**. There are many different options for Quick Step “Actions,” and you can choose multiple actions for the same Quick Step.
8. For example, you could make the first action “Mark As Read,” then add another action such as “Forward to,” and a third action such as “Move to” a folder.
9. If you want, from the **Choose a shortcut** drop-down menu, select a keyboard shortcut to

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- assign to that Quick Step.
10. When the actions are complete, click **Save**.

IMPORTANT NOTICES

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