



superhighways
harnessing **technology** for **community** benefit

Outlook tips

Outlook on the Web

Organising your inbox & more

#DigitalFoundations

Digital Foundations programme

There are many ways we can help small community organisations make sound choices about the digital tools and technology they use.



Communications made easy

Raise your profile using digital tools to engage supporters and fund your future

[Read more »](#)



Digital basics

Work and collaborate online using free and affordable digital tools and technology

[Read more »](#)



Websites for communities

Put your website at the heart of your charity or community organisation's story

[Read more »](#)

[Find out more about the Digital Foundations programme](#)



What we'll be covering today...

- ✓ Settings & views
- ✓ Flagging & categorising
- ✓ Sorting, filtering & search
- ✓ Sub boxes, moving emails
- ✓ Scheduling emails & mail merge
- ✓ Signatures & Out of office
- ✓ Encrypting emails
- ✓ Email templates
- ✓ Using CoPilot with Outlook
- ✓ Turning emails into Tasks
- ✓ Snoozing emails
- ✓ Using rules
- ✓ Focused & Conversation modes
- ✓ Quick steps

** And becoming familiar with Settings options and using Help so you can look things up & make changes in future **



Why Outlook on the web?

Within Microsoft 365, Outlook for Windows requires a M365 Business Standard or M365 Business Premium licence.

These are not provided as donated/free within the non-profit program.

Outlook on the web is available in the non-profit program as part of the Business basic licence for free (up to 300 users)



Get more help with the new Outlook on the web

Email: Compose or reply

Create, reply to, or forward email messages in Outlook on the web

Create and add an email signature in Outlook on the web

Add pictures and attach files to emails in Outlook

Turn on automatic forwarding in Outlook on the web

Block senders or unblock senders in Outlook on the web

Use intelligent technology in Outlook on the web

Email: Customize settings

Focused Inbox for Outlook

Reset your Microsoft 365 password

POP and IMAP email settings for Outlook

Email: Organize

Manage email messages by using rules in Outlook

Organize your inbox with Archive, Sweep, and other tools in Outlook on the web

Use categories in Outlook on the web

Recover and restore deleted items in Outlook

Filter junk email and spam in Outlook on the web

Microsoft cheat sheets

- ✓ [Outlook Mail on the Web cheat sheet](#)
- ✓ [Outlook Mail for Windows cheat sheet](#)
- ✓ [Outlook Calendar on the Web cheat sheet](#)
- ✓ [Outlook Calendar for Windows cheat sheet](#)

Cheat sheet - Outlook on the web Mail



Organize your Inbox

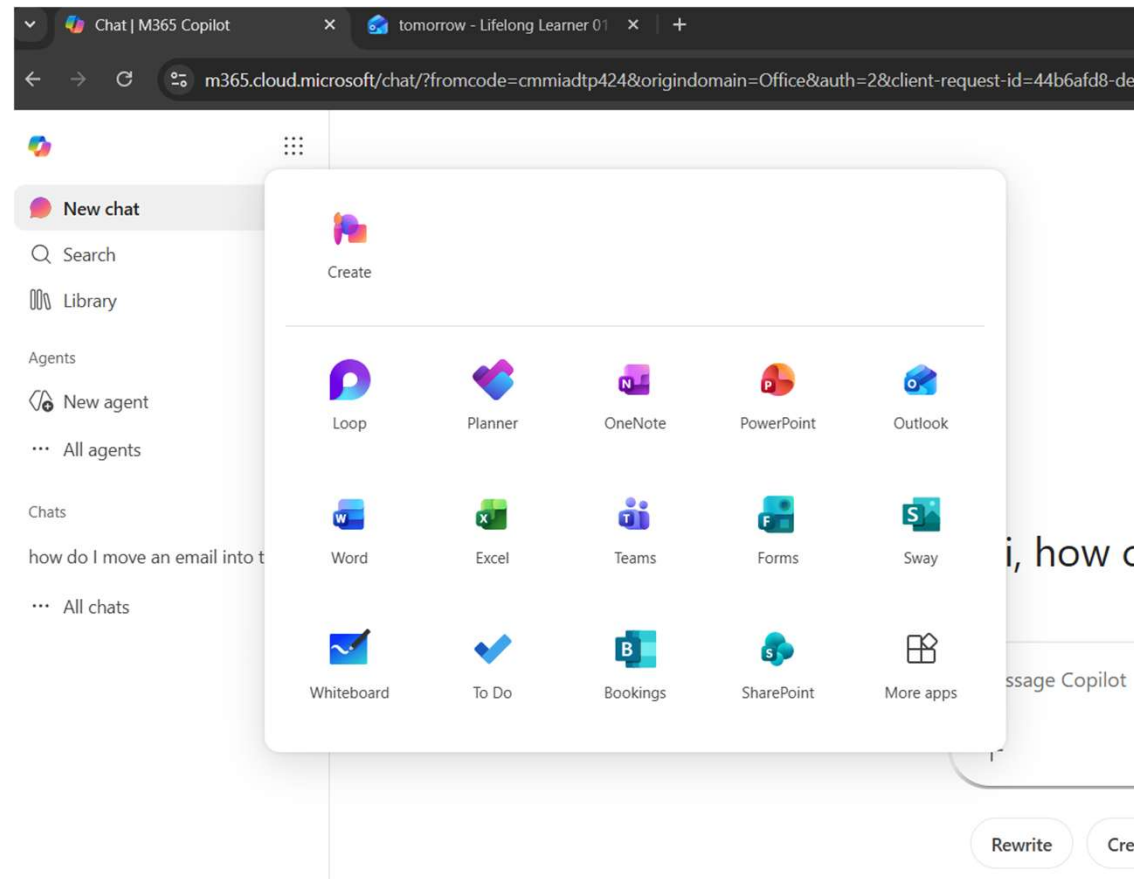
The screenshot shows the Outlook web interface with the following elements and callouts:

- Search bar:** A callout points to the search bar with the text: "Switch between **Focused** and **Other** inbox."
- Filter dropdown:** A callout points to the "Filter" dropdown menu with the text: "Filter, sort, and turn on **Conversations** and **Focused Inbox**."
- Unread messages:** A callout points to the "Unread" filter option with the text: "See only your **Unread** messages."

The interface also shows a sidebar with "Favorites", "Folders", and "Inbox (46)", and a main area displaying a message from Grady Archie.

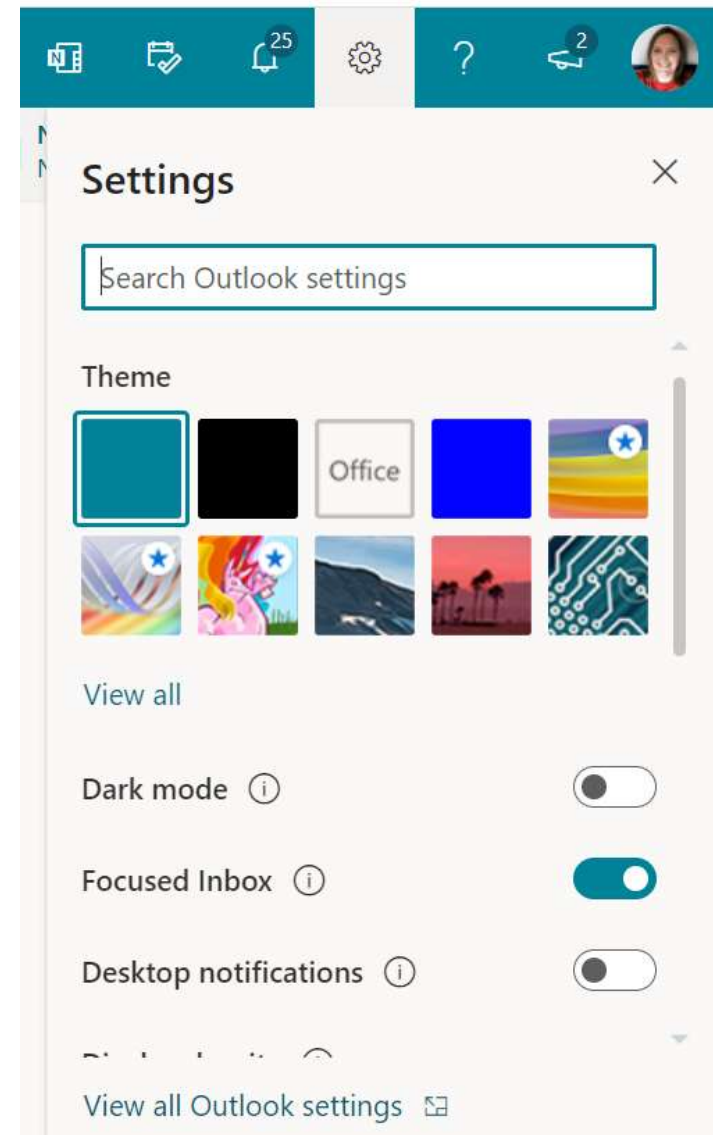


Outlook web app (online Outlook accessed via a browser)



Outlook Settings

- ✓ Click on the cog wheel at the top right to access Settings
- ✓ Either scroll through or use the Search box e.g. 'Out of Office' will find you the Automated responses settings



Changing your View

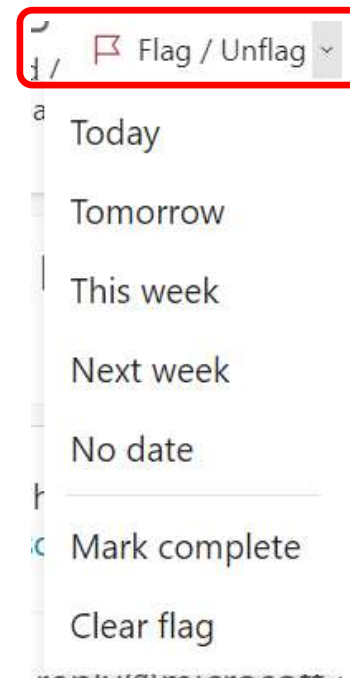
- ✓ Select the View tab
- ✓ Click on e.g. Message preview and Reading pane and choose the options that suit you – e.g. whether you have a preview of emails as well as a list
- ✓ Choose to select (or not) Conversation View (this links email replies in a single thread but allows you to navigate to a specific email when you click the arrow to expand the conversation)
- ✓ Choose how your emails are sorted – e.g. by Date (you can choose which order)
- ✓ Alternatively use the View settings option (top right) for more options including Focused inbox



Flagging emails for follow up

Useful as a reminder to follow up on an email when you don't have time there and then...

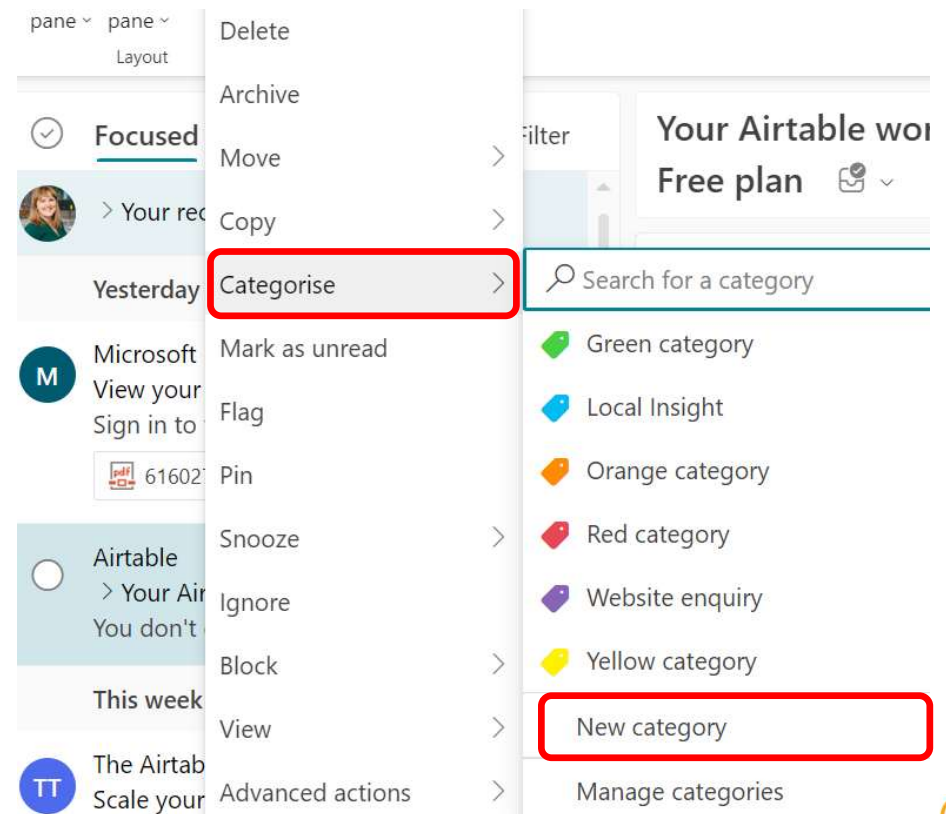
- ✓ Right click on an email
- ✓ Select Flag
- ✓ Or select email and use the Flag/Unflag option in the menu bar, Home tab
- ✓ Here you can choose a timeframe



Categorising emails

Categorise your emails against standard or custom options – you can then search and filter for quick access

- ✓ Right click on an email
- ✓ Select Categorise & select a Category
- ✓ To add a new Category, select New category



✓ Choose Manage categories so you can:

- ✓ Create a new category
- ✓ Rename existing ones
- ✓ Change the colours

Categories

Categorising your emails and calendar can help you organise and track your time for yourself or for a person. You can create new categories and assign them names and colours.

+ [Create category](#)

 Green category		
 Local Insight		
 Orange category		
 Red category		
 Website enquiry		
 Yellow category		

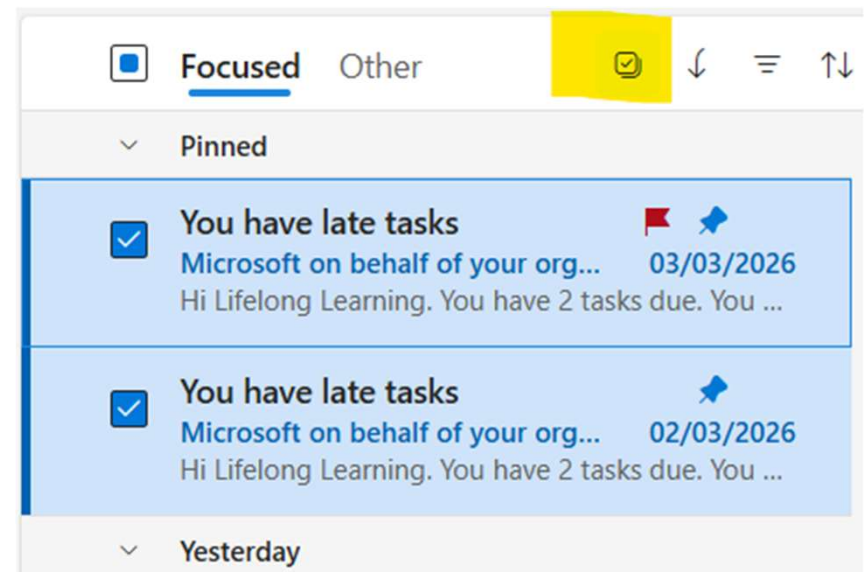


Using the Select Box to Manage Multiple Emails

Click on the select box at the top of the email list:

Select emails you wish to action together

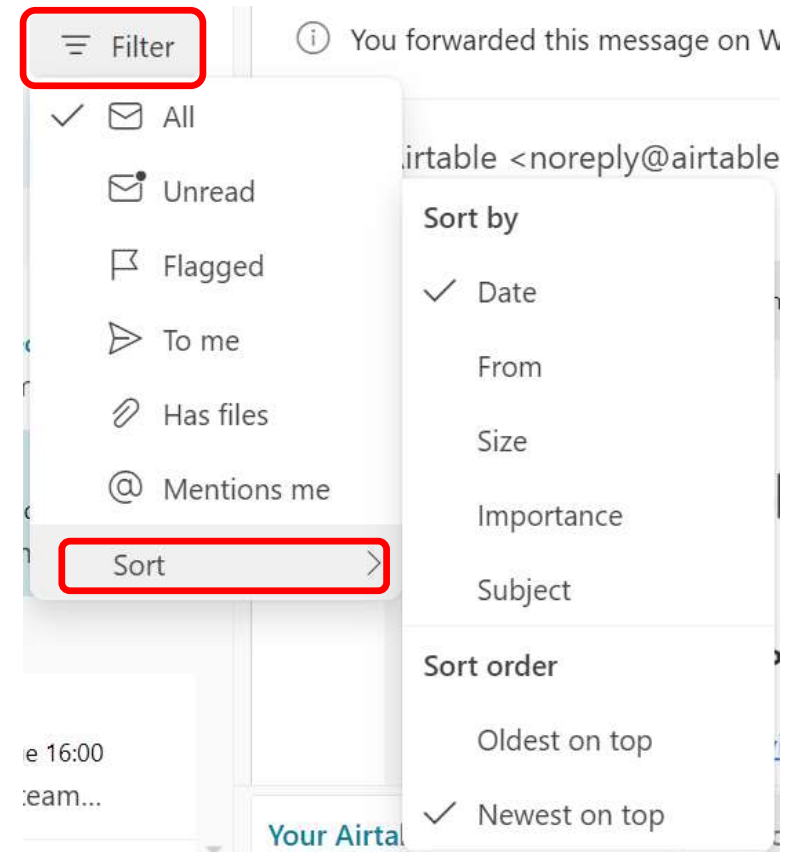
Choose the action: delete, move, categorise, move , flag etc.



Filtering & sorting

Filtering & sorting can help you quickly find and action an email

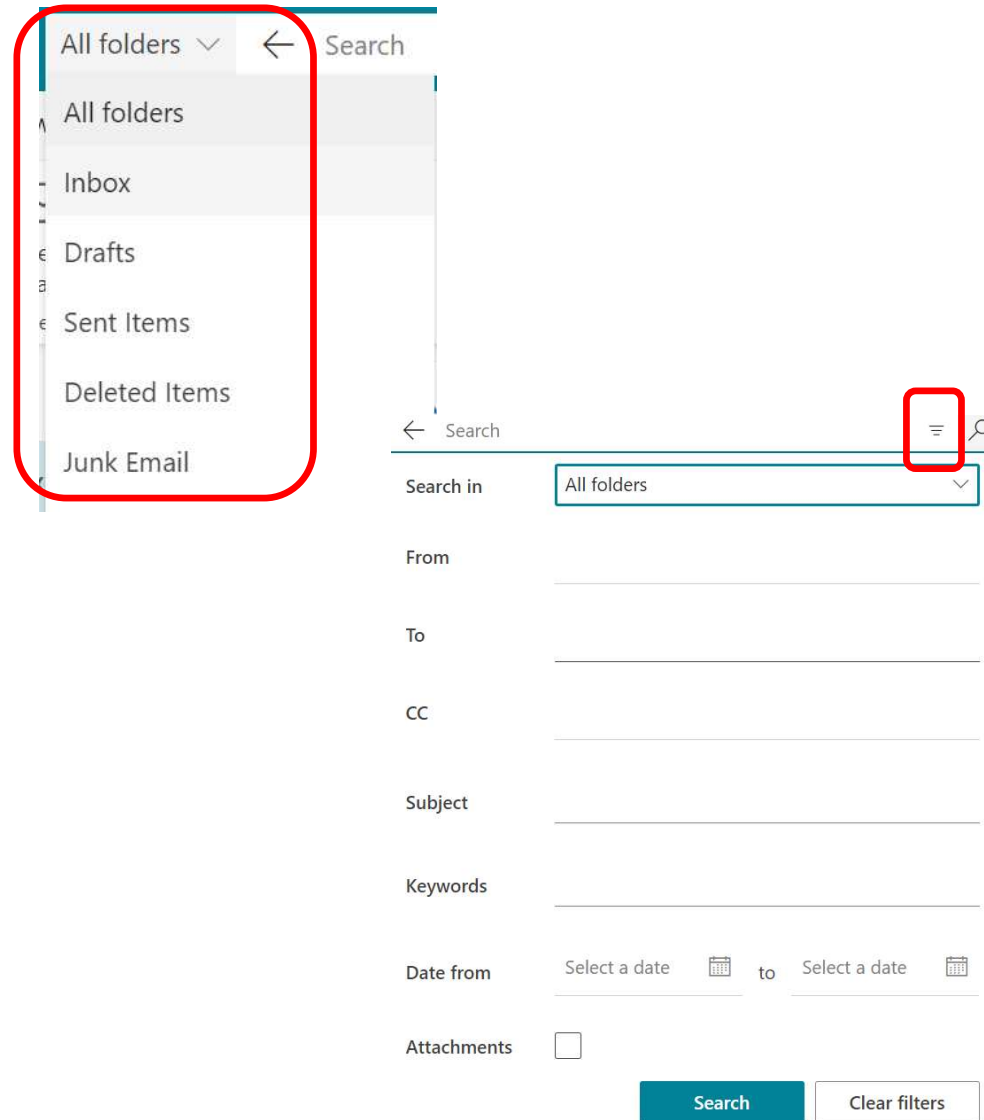
- ✓ Click on the Filter icon at the top right of your list of emails
- ✓ Either Sort on e.g. Size, Date, From (and reverse the sort to suit) and your emails are re-ordered accordingly
- ✓ Or choose one of the Filter options e.g. Flagged, Unread or Has files – and only those email will be shown



Using search

The Search bar is at the top of your Window

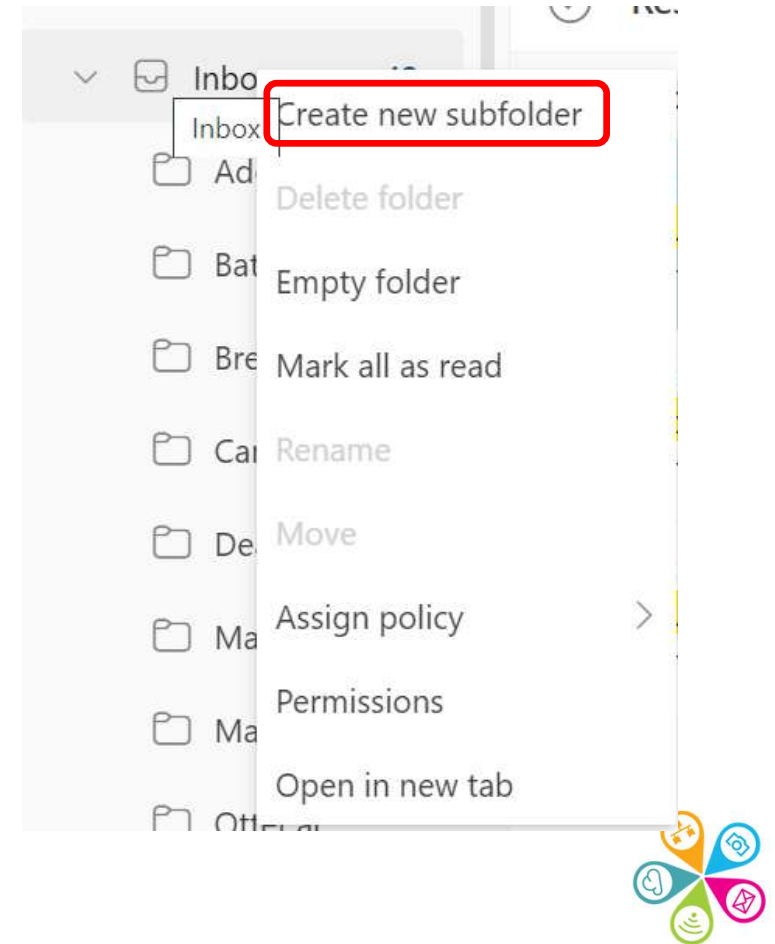
- ✓ By default, search will look in all folders. Click the left arrow to specify a particular folder to search in e.g. Sent
- ✓ Select the Filter icon at the right of the Search bar for more advanced search options as shown



Sub folders

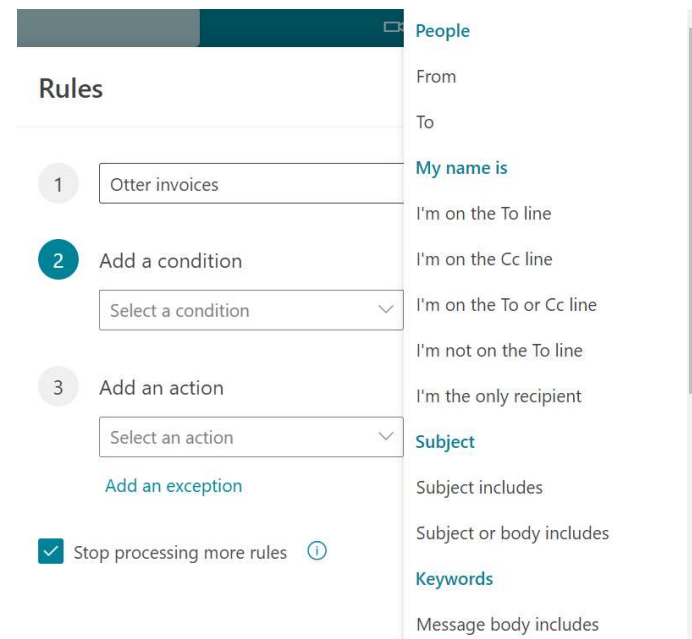
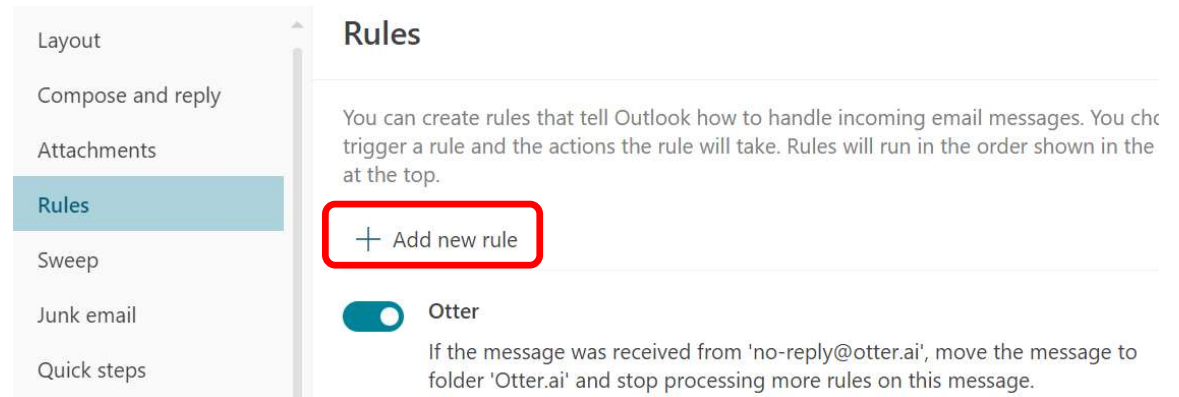
Setting up sub folders can help you organise your inbox to find emails you need...

- ✓ Right click on your Inbox
- ✓ Select Create new subfolder
- ✓ Give your folder a name
- ✓ Either right click on emails and choose Move to folder
- ✓ Or drag and drop emails to this folder



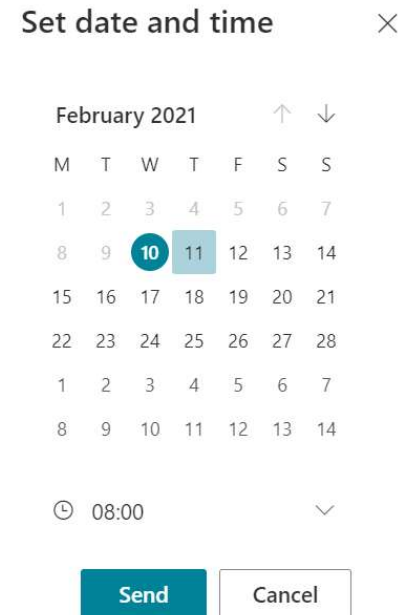
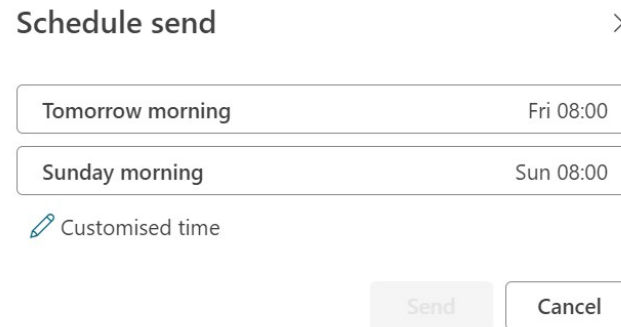
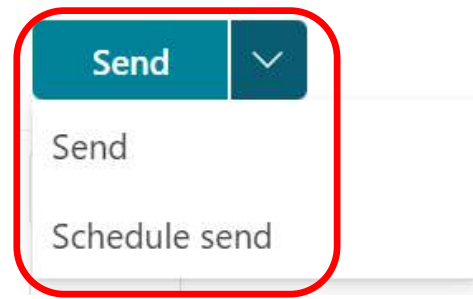
Rules

- ✓ Search for Rules via the Settings cog and select Inbox rules
- ✓ Here you'll see any rules already applied to your account
- ✓ You can also Add a new rule
- ✓ Identify your new rule with a name and then choose the Condition and Action from the options available



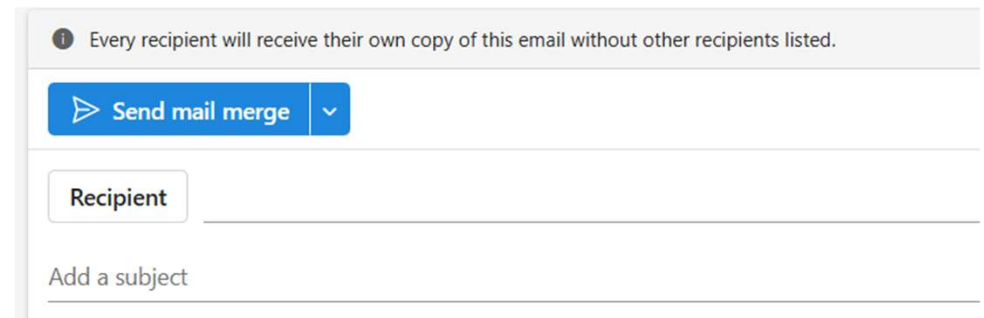
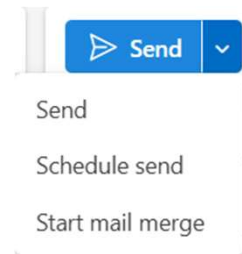
Scheduling send

- Click the Down arrow next to Send and select Schedule send
- Now choose the date and time from suggested options or choose **Customised time** and choose exactly when you'd like the email to send



Send Mail Merge

- Click the Down arrow next to Send and select
- Now choose the recipients.
- Every recipient will receive their own copy of the email without other recipients listed




Adding / editing signatures

- ✓ Search for signature via the Settings cog
- ✓ Add your signature and choose whether to include just in new messages or also for replies and forwards
- ✓ Bookings link!

Compose and reply

Email signature

Create a signature that will be automatically added to your email messages.



The toolbar contains the following icons from left to right: an image icon, a link icon, a font color icon (AA), a font size icon (A with a diamond), a bold icon (B), an italic icon (I), an underline icon (U), a highlighter icon (pencil with a yellow highlight), a text color icon (A with a red underline), a bulleted list icon, a numbered list icon, a left-align icon, and a right-align icon.

- Automatically include my signature on new messages that I compose
- Automatically include my signature on messages I forward or reply to

Out of Office (Automatic Replies)

- ✓ Search for Out of Office in Settings
- ✓ Then choose Automatic Replies
- ✓ Toggle Automatic replies on
- ✓ Set a date range *(or a reminder in your calendar to manually switch this off when you're back!)*
- ✓ You can set a different message to send internally (to your colleagues) and externally

Automatic replies

Use automatic replies to let others know you're on holiday or aren't replies to start and end at a specific time. Otherwise, they'll continue

Automatic replies on

Send replies only during a time period

Start time 13/04/2023 08:00

End time 14/04/2023 08:00

Send automatic replies inside your organisation

Rich text editor toolbar with icons for undo, font color, background color, bold, italic, underline, link, unlink, bulleted list, numbered list, and indent.

Add a message here

Send replies outside your organisation

Send replies only to contacts



Encrypting emails

Sending encrypted emails (Outlook / M365)

- Email is protected so only the intended recipient can read it
- Works with any email address – no Microsoft account required

What recipients experience

Microsoft 365 users:

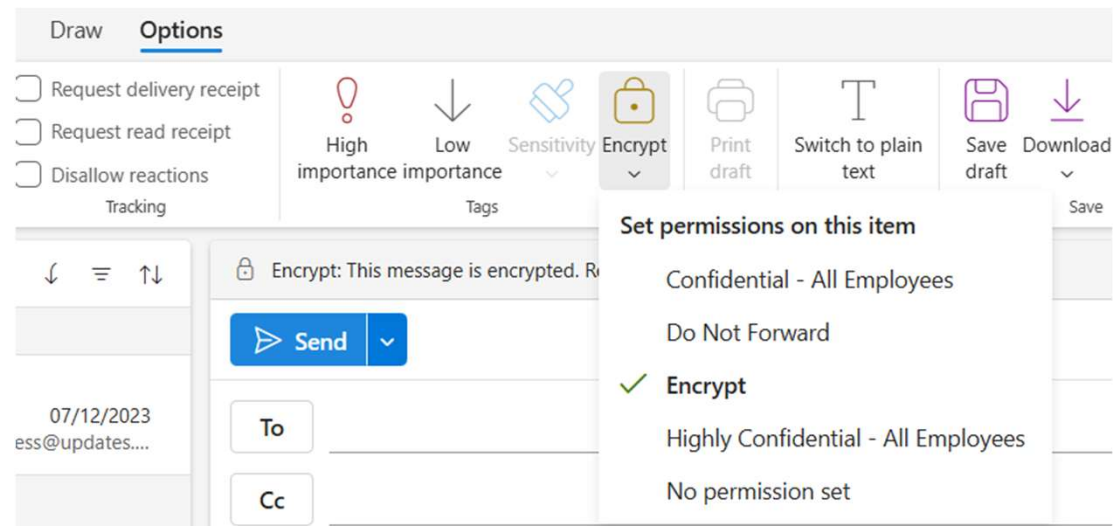
- Opens directly in Outlook
- No extra steps

Gmail / other email users:

- Click “Read the message” link
- Enter a one-time passcode or sign in

Non-technical users:

- May need guidance the first time
- Extra step compared to normal email



Email Templates

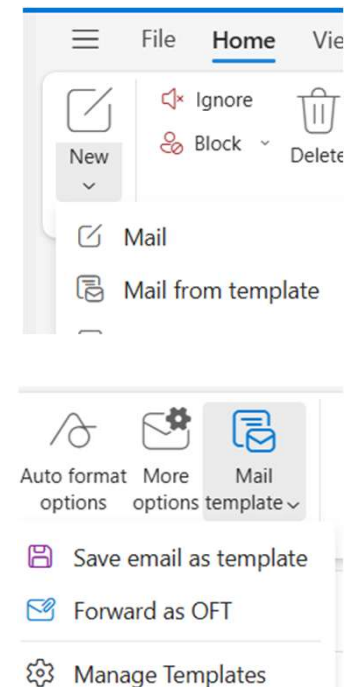
Access via: settings, new or mail template

Reusable, pre-formatted emails:

Outlook templates let you save messages (including subject, content, formatting, and even attachments) so you can quickly reuse them instead of writing from scratch.

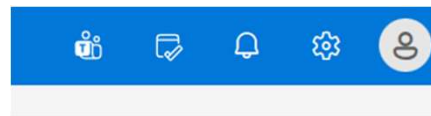
Improve efficiency and consistency:

They help you send replies faster while keeping messaging consistent, reducing errors and ensuring a professional tone across communications.



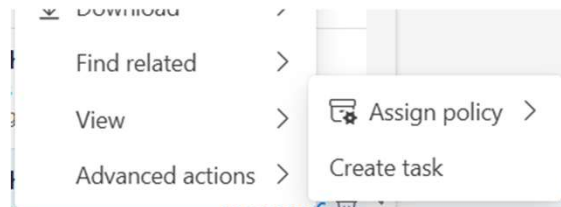
Turning emails into tasks

Click tasks in top bar



Select email & right click, create task.

You can then edit the task title, give it due dates etc.



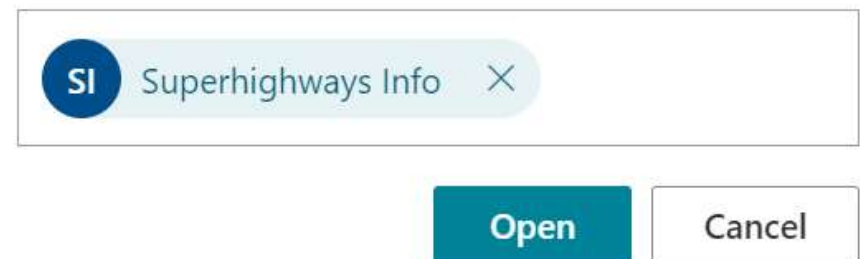
Quick steps great for this!



Open another mailbox via web

- ✓ Click on your profile pic / initials in the top right and select Open another mailbox
- ✓ Type in the mailbox you need to open (this will depend on what you have access to) and click Open. It will open in a new Tab.

Open another mailbox



SI Superhighways Info ×

Open Cancel

What we'll be covering today...

- ✓ Settings & views
- ✓ Flagging & categorising
- ✓ Sorting, filtering & search
- ✓ Sub boxes, moving emails
- ✓ Scheduling emails & mail merge
- ✓ Signatures & Out of office
- ✓ Encrypting emails
- ✓ Email templates
- ✓ Using CoPilot with Outlook
- ✓ Turning emails into Tasks
- ✓ Snoozing emails
- ✓ Using rules
- ✓ Focused & Conversation modes
- ✓ Quick steps

** And becoming familiar with Settings options and using Help so you can look things up & make changes in future **



About Superhighways

Providing tech support to small local charities in London for over 20 years

- ✓ Support
- ✓ [Training](#)
- ✓ Consultancy
- ✓ Digital inclusion
- ✓ [Datawise London](#)
- ✓ [See all services](#)
- ✓ [E-news sign up](#)





Thank you for listening

PAUL FIRBY

info@superhighways.org.uk

@SuperhighwaysUK

#DigitalFoundations