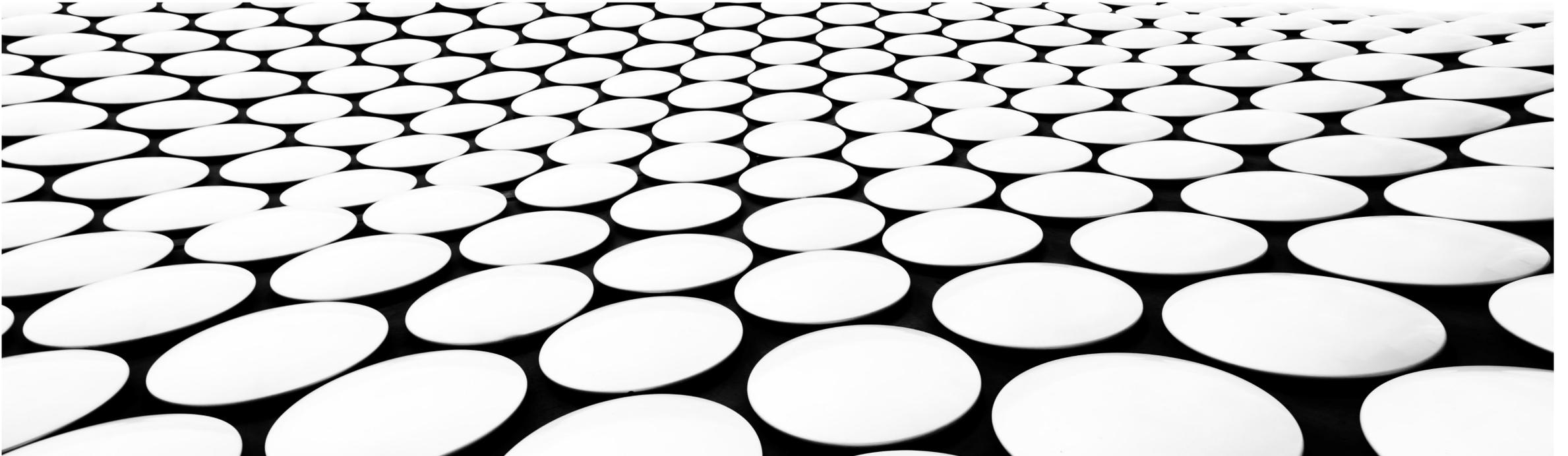


---

# HOW TO BE THE BOSS OF YOUR EMAIL

KRISTIE ONDRACEK, CPA, CGMA, CAE

TXCPA HOUSTON - CFO/COO



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# OBJECTIVES FOR THE DAY

- Outlook Options
- Organizing Emails
- Making Life Easier with Rules and Other Hacks



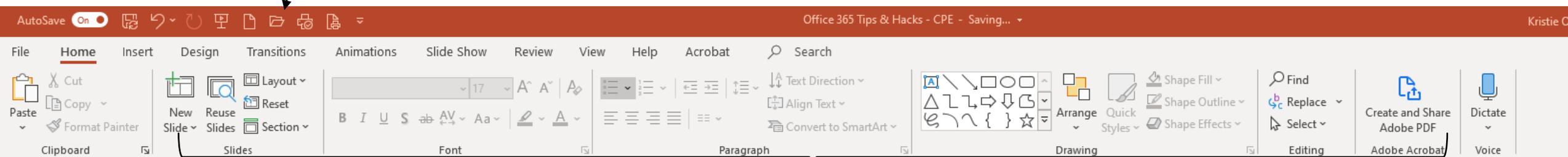
# WHY IT IS IMPORTANT TO BE THE BOSS OF YOUR EMAIL

28% OF WORKTIME IS SPENT OVER EMAIL = 2.5 HOURS OF 8  
HOURS IS SPENT IN EMAIL

# NAVIGATING OFFICE APPS

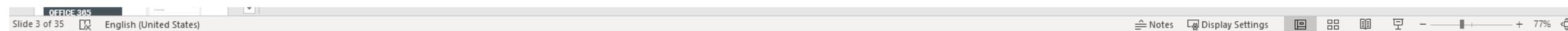
Quick Access Toolbar

Title Bar



Ribbon

Information bar at the bottom



---

# WHAT DOES IT MEAN WHEN YOU SEE

Ctrl +



Home

New

Open

Info

Save a Copy

Save as Adobe  
PDF

Print

Share

Export

Close

Account

Feedback

Options

# UNDER FILE MENU OPTION

# OPTIONS

PowerPoint Options

? X

General options for working with PowerPoint.

### User Interface options

When using multiple displays: ⓘ

- Optimize for best appearance
- Optimize for compatibility (application restart required)

Show Mini Toolbar on selection ⓘ

Enable Live Preview ⓘ

Collapse the ribbon automatically ⓘ

ScreenTip style: Show feature descriptions in ScreenTips ▼

### Personalize your copy of Microsoft Office

User name: Kristie Ondracek

Initials: KO

Always use these values regardless of sign in to Office.

Office Background: No Background ▼

Office Theme: Colorful ▼

### Privacy Settings

Privacy Settings...

### PowerPoint Designer

Ask for design suggestions any time by clicking Design Ideas on the Design tab.

Automatically show me design ideas

[About PowerPoint Designer](#)

### LinkedIn Features

OK Cancel

# OUTLOOK

VARIOUS TOOLS WITHIN OUTLOOK TO HELP GET YOU ORGANIZED AND PRODUCTIVE

The screenshot displays the Microsoft Outlook interface. At the top, there is a blue header bar with a search box and window controls. Below this is the ribbon, which is currently set to the 'Home' tab. The ribbon contains several groups of icons for actions like 'New Email', 'Zoom', 'Delete', 'Respond', 'Quick Steps', 'Move', 'Tags', 'Groups', 'Find', 'Speech', 'Add-ins', 'Teams', and 'Viva Insights'. Below the ribbon is the navigation pane on the left, showing a list of folders and a search box. The main area of the interface shows an email list with columns for 'From', 'Subject', 'Received', and 'Categories'. The selected email is from 'Morgan Shepherd <mShepherd@mccoyrockford.com>' with the subject 'TXCPA + McCoy Rockford'. The email details pane on the right shows the sender's name and email address, and a set of action buttons including 'Reply', 'Reply All', and 'Forward'.

File Home Send / Receive Folder View Help Acrobat

Search

New Email New Items Schedule a Meeting Start Instant Meeting Zoom

Ignore Clean Up Delete Archive Reply Reply All Forward IM More

Quick Steps

Move Rules OneNote

Assign Policy Unread/Read Categorize Follow Up

New Group Browse Groups

Search People Address Book Filter Email

Read Aloud Get Add-ins Share to Teams Viva Insights

> Favorites

kondracek@txcpahouston.cpa

Focused Other

By Flag

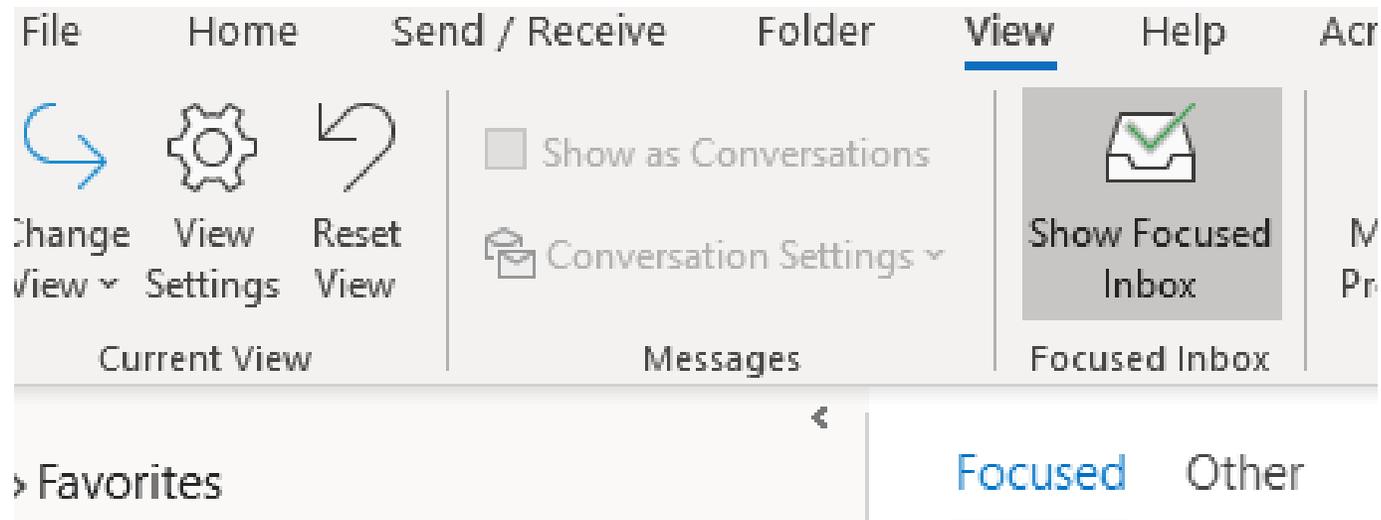
!@ From Subject Received Categories

> Followup Flag: 233 item(s)

TXCPA + McCoy Rockford

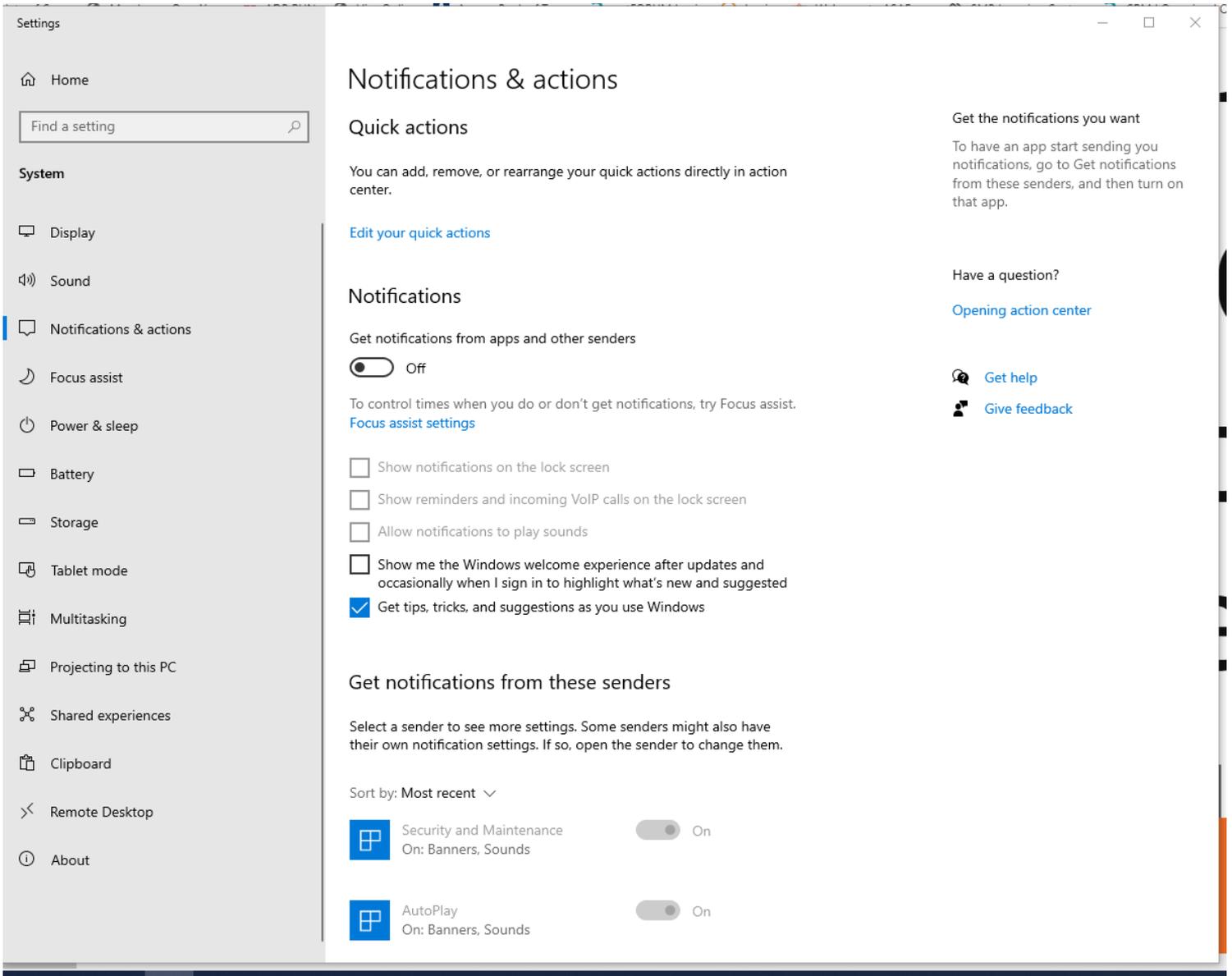
Morgan Shepherd <mShepherd@mccoyrockford.com>

Reply Reply All Forward



**HAVE AI  
DECLUTTER  
YOUR EMAIL**

# NOTIFICATIONS



The screenshot shows the Windows Settings application with the 'Notifications & actions' category selected in the left-hand navigation pane. The main content area is titled 'Notifications & actions' and includes several sections: 'Quick actions' with an 'Edit your quick actions' link; 'Notifications' with a toggle switch set to 'Off' and a link to 'Focus assist settings'; a list of notification preferences such as 'Show notifications on the lock screen' and 'Get tips, tricks, and suggestions as you use Windows' (checked); and 'Get notifications from these senders' with a 'Sort by: Most recent' dropdown and two senders listed: 'Security and Maintenance' and 'AutoPlay', both with their notification toggles set to 'On'. On the right side of the window, there are links for 'Get the notifications you want', 'Have a question?', 'Opening action center', 'Get help', and 'Give feedback'.

Settings

Home

Find a setting

**System**

- Display
- Sound
- Notifications & actions**
- Focus assist
- Power & sleep
- Battery
- Storage
- Tablet mode
- Multitasking
- Projecting to this PC
- Shared experiences
- Clipboard
- Remote Desktop
- About

## Notifications & actions

### Quick actions

You can add, remove, or rearrange your quick actions directly in action center.

[Edit your quick actions](#)

### Notifications

Get notifications from apps and other senders

Off

To control times when you do or don't get notifications, try Focus assist.  
[Focus assist settings](#)

- Show notifications on the lock screen
- Show reminders and incoming VoIP calls on the lock screen
- Allow notifications to play sounds
- Show me the Windows welcome experience after updates and occasionally when I sign in to highlight what's new and suggested
- Get tips, tricks, and suggestions as you use Windows

### Get notifications from these senders

Select a sender to see more settings. Some senders might also have their own notification settings. If so, open the sender to change them.

Sort by: Most recent

- Security and Maintenance  
On: Banners, Sounds  On
- AutoPlay  
On: Banners, Sounds  On

Get the notifications you want

To have an app start sending you notifications, go to Get notifications from these senders, and then turn on that app.

Have a question?

[Opening action center](#)

[Get help](#)

[Give feedback](#)

# NOTIFICATIONS

## Message arrival



When new messages arrive:

- Play a sound
- Briefly change the mouse pointer
- Show an envelope icon in the taskbar
- Display a Desktop Alert
- Enable preview for Rights Protected messages (May impact performance)



Info

Open & Export

Save As

Save as Adobe PDF

Save Attachments

Print

Office Account

Feedback

Options

Exit

# Account Information

 kondracek@houstoncpa.org  
Microsoft Exchange

+ Add Account

  
Account Settings

## Account Settings

Change settings for this account or set up more connections.

- Access this account on the web.  
<https://outlook.office365.com/owa/houstoncpa.org/>
- [Get the Outlook app for iPhone, iPad, Android, or Windows 10 Mobile.](#)



Change

  
Automatic Replies

## Automatic Replies (Out of Office)

Use automatic replies to notify others that you are out of office, on vacation, or not available to respond to email messages.

- Automatic replies are being sent.

Turn off

  
Tools

## Mailbox Settings

Manage the size of your mailbox by emptying Deleted Items and archiving.

- 84.4 GB free of 99 GB

  
Manage Rules & Alerts

## Rules and Alerts

Use Rules and Alerts to help organize your incoming email messages, and receive updates when items are added, changed, or removed.

  
Manage COM Add-ins

## Slow and Disabled COM Add-ins

Manage COM add-ins that are affecting your Outlook experience.

  
Manage Add-ins

## Manage Add-ins

Manage and acquire Web Add-ins for Outlook.

# OUTLOOK - OPTIONS

- General
- Mail**
- Calendar
- Groups
- People
- Tasks
- Search
- Language
- Ease of Access
- Advanced
- Customize Ribbon
- Quick Access Toolbar
- Add-ins
- Trust Center



Change the settings for messages you create and receive.

### Compose messages



Change the editing settings for messages.

Editor Options...

Compose messages in this format: HTML

abc



Always check spelling before sending

Spelling and Autocorrect...

Ignore original message text in reply or forward



Create or modify signatures for messages.

Signatures...



Use stationery to change default fonts and styles, colors, and backgrounds.

Stationery and Fonts...

### Outlook panes



Customize how items are marked as read when using the Reading Pane.

Reading Pane...

### Message arrival



When new messages arrive:

Play a sound

Briefly change the mouse pointer

Show an envelope icon in the taskbar

Display a Desktop Alert

Enable preview for Rights Protected messages (May impact performance)

### Conversation Clean Up

OK

Cancel

# OUTLOOK - OPTIONS

- General
- Mail
- Calendar
- Groups
- People
- Tasks
- Search
- Language
- Ease of Access
- Advanced**
- Customize Ribbon
- Quick Access Toolbar
- Add-ins
- Trust Center

### Options for working with Outlook.

**Outlook panes**

Customize Outlook panes. Navigation... Reading Pane...

**Outlook start and exit**

Start Outlook in this folder:  Browse...

Empty Deleted Items folders when exiting Outlook

**AutoArchive**

Reduce mailbox size by deleting or moving old items to an archive data file. AutoArchive Settings...

**Link Handling**

Open supported hyperlinks to Office files

**Reminders**

Show reminders

Play reminder sound:

Show reminders on top of other notifications

Automatically dismiss reminders

**Pen**

Use pen to select and interact with content

**Export**

### Select Folder

Start in this folder:

- ▼ E: kondracek@txcpahouston.cpa
  - > **Inbox (2)**
  - > **Drafts [6]**
  - > **Deleted Items (9732)**
  - > Archive
  - > Calendar
  - > Contacts
  - > Conversation History
  - > Sent Items
  - > Journal
  - > **Junk Email**
  - > Notes
  - > **Outbox [5]**
  - > RSS Feeds

OK Cancel

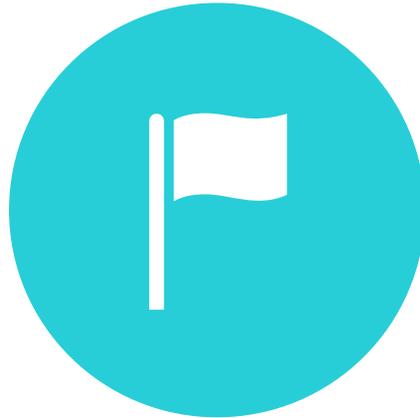
# OUTLOOK - OPTIONS

---

## WHEN EMAILS ARE TASKS – HOW TO TRACK



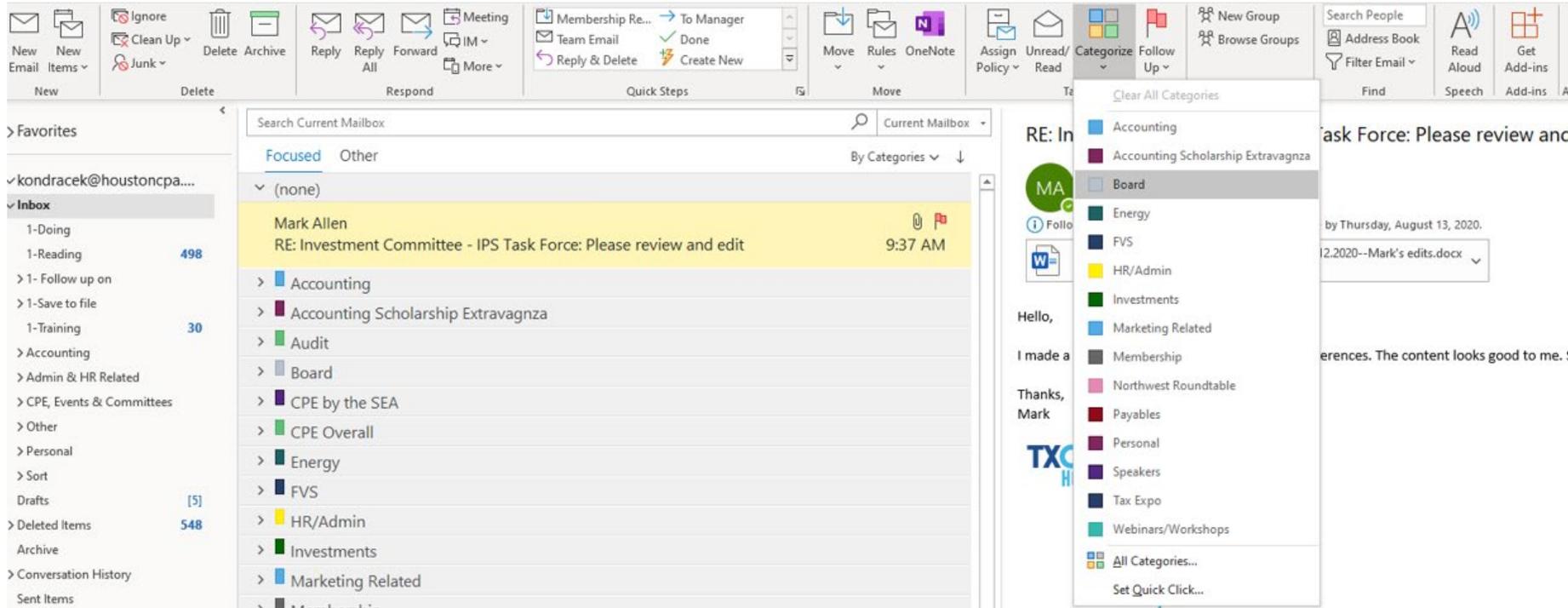
UNREAD EMAILS TO  
INDICATE UNDONE ITEMS



FLAGS TO GIVE DEADLINE

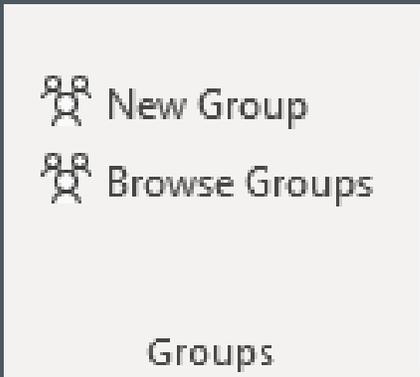


SEPARATE FOLDER



# FOLLOW UP FLAGS

# DISTRIBUTION LIST



**Create Group** ? x

**Name** ⓘ

Group name

Group name:

**Email address**

Email address

Group email address:

**Description**

Let people know what your group is about. Both members and non-members see this description.

**Classification**

**Privacy**

Private - Only approved members can see what's inside. ▾

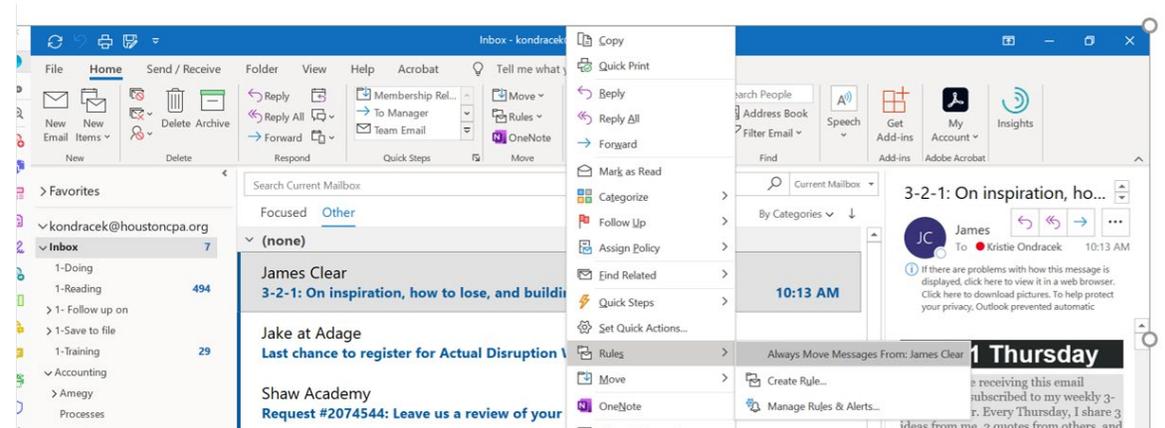
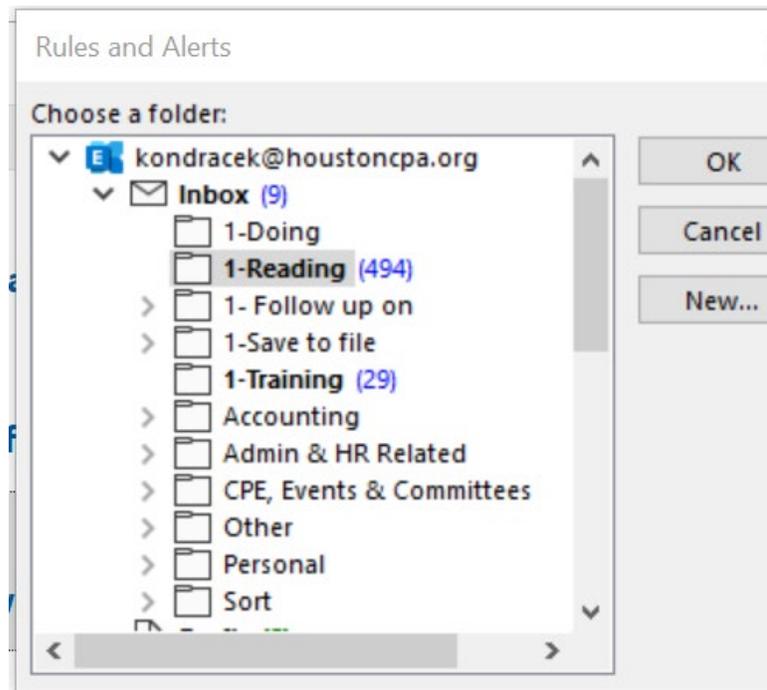
Send all group email and events to members' inboxes. They can change this setting later.

[More Settings](#)

Create You'll be able to add members after you select Create.

# OUTLOOK – CREATING RULES FOR EMAILS

IF YOU ARE MOVING EMAILS TO THE SAME FOLDER EACH DAY, SAVE TIME AND CREATE A RULE



# OUTLOOK – CREATING RULES FOR EMAILS

IF YOU ARE MOVING EMAILS TO THE SAME FOLDER EACH DAY, SAVE TIME AND CREATE A RULE

Step 1: Select condition(s)

- from James Clear
- with 3-2-1: On inspiration, how to lose, and building a ... in the subject
- sent to Kristie Ondracek
- with 3-2-1: On inspiration, how to lose, and bu... in the subject or body
- through the specified account
- sent only to me
- where my name is in the To box
- marked as importance
- marked as sensitivity
- flagged for action
- where my name is in the Cc box
- where my name is in the To or Cc box
- where my name is not in the To box
- with specific words in the body
- with specific words in the message header
- with specific words in the recipient's address
- with specific words in the sender's address
- assigned to category category

Step 2: Edit the rule description (click an underlined value)

Apply this rule after the message arrives

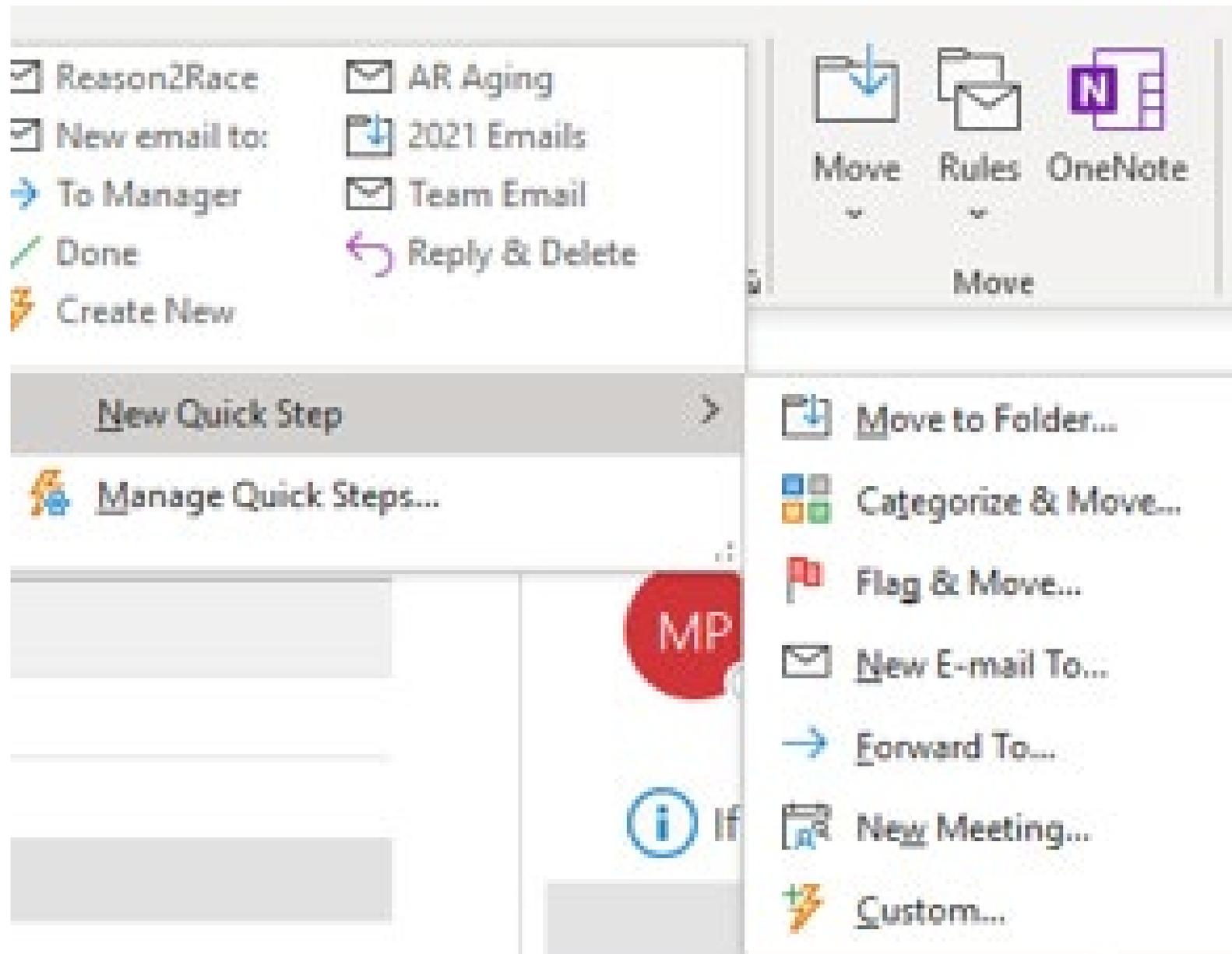
Create Rule

When I get email with all of the selected conditions

- From James Clear
- Subject contains 3-2-1: On inspiration, how to lose, and building a s
- Sent to me only

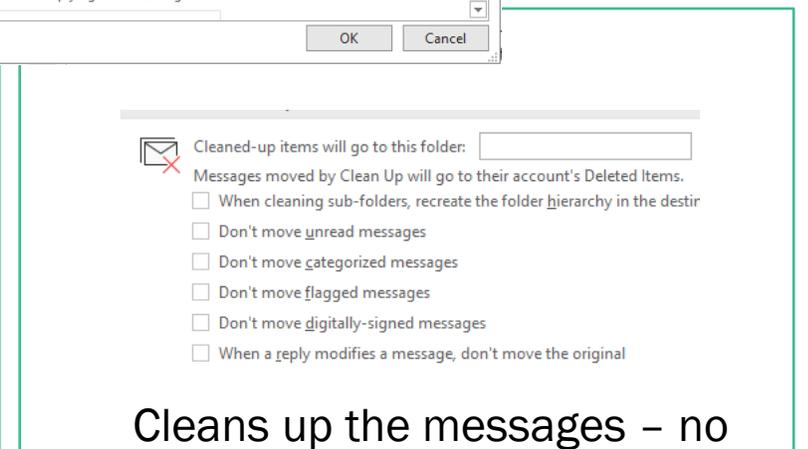
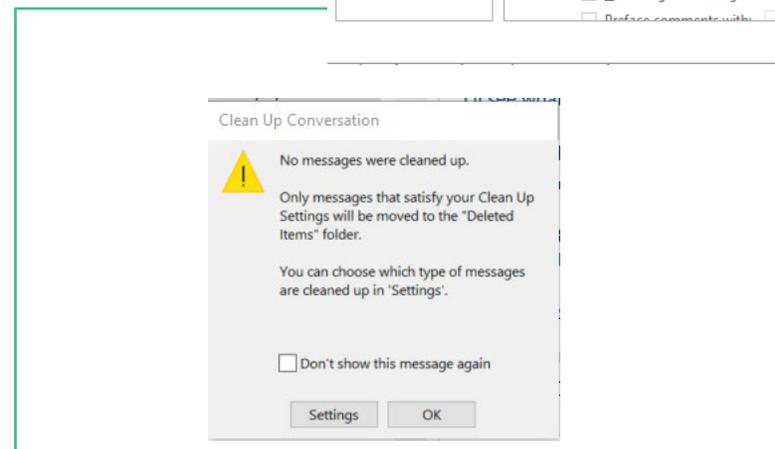
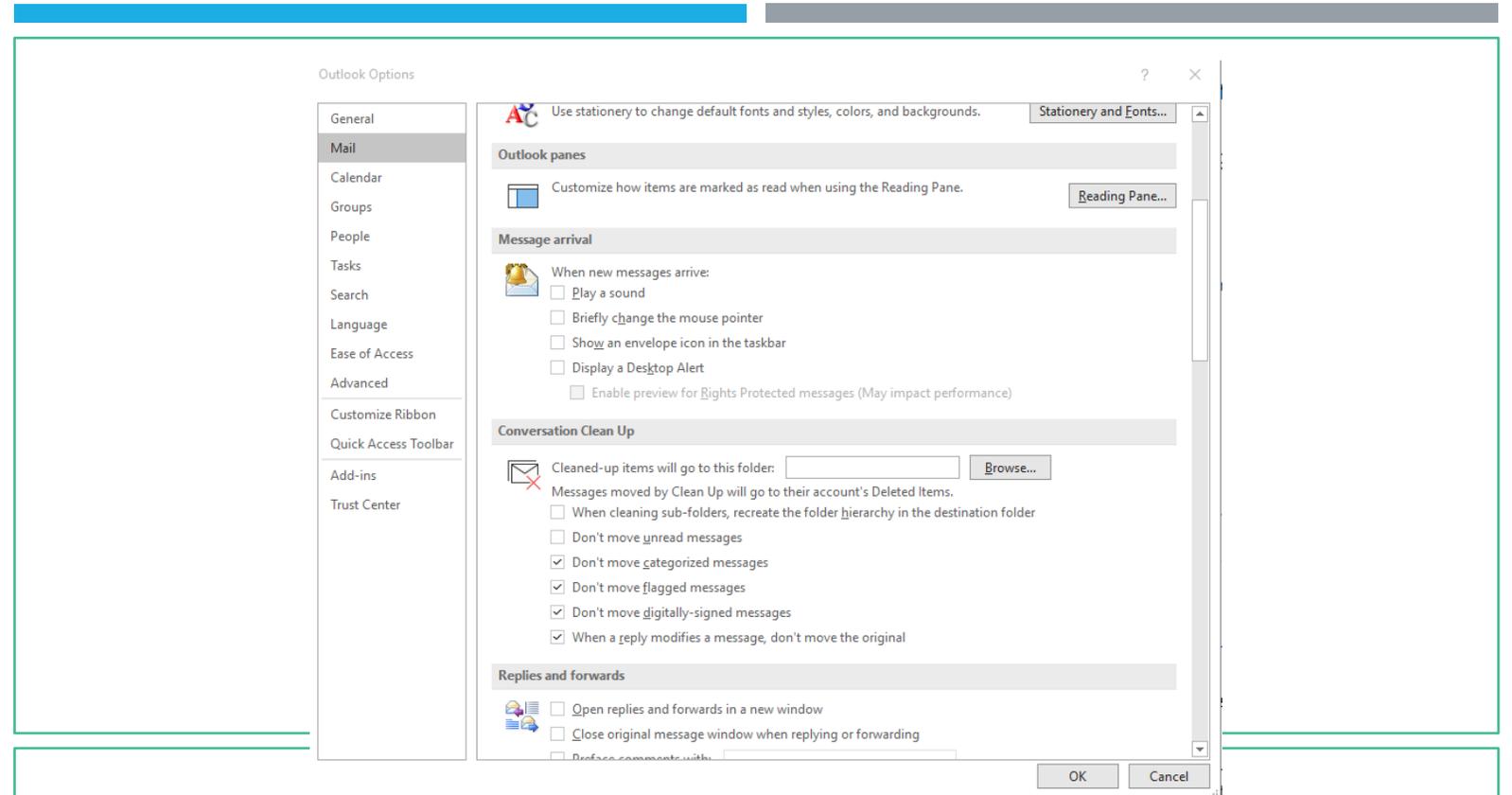
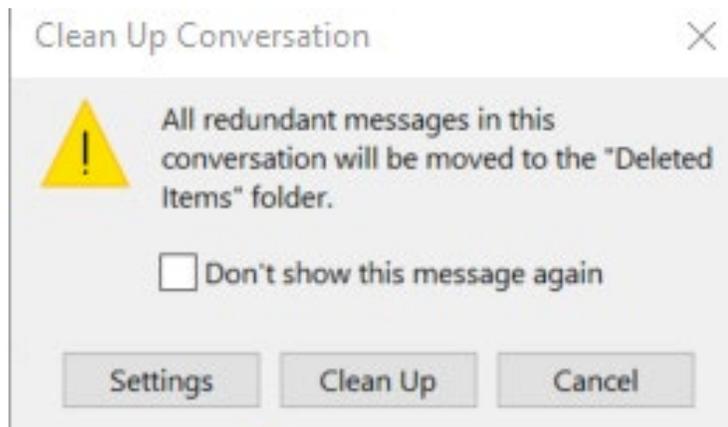
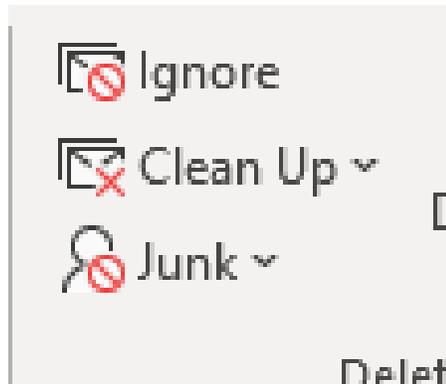
Do the following

- Display in the New Item Alert window
- Play a selected sound: Windows Notify Em
- Move the item to folder: 1-Reading



# QUICK STEPS – CREATING TEMPLATES

# CLEAN UP MESSAGE



Cleans up the messages – no warning message

# IGNORE MESSAGES

Ignore Conversation



The selected conversation and all future messages will be moved to the Deleted Items folder.

Don't show this message again

Ignore Conversation

Cancel

# HOW THAT EMAIL CAN BE ADDED TO CALENDAR AND TASK LIST

The screenshot shows the Outlook 'Task' ribbon with the following options: Save & Close, Delete, Forward, OneNote, Task, Details, Mark Complete, Assign Task, Send Status Report, Recurrence, Categorize, Follow Up, High Importance, Low Importance, and Zoom. Below the ribbon, the task details for 'Tax Update Class' are displayed:

Subject	Tax Update Class	
Start date	None	Status: Not Started
Due date	None	Priority: Normal
Reminder	None	% Complete: 0%
Reminder Time	None	Owner: Kristie Ondracek

-----  
**From:** Kristie Ondracek  
**Sent:** Thursday, December 30, 2021 11:15 AM  
**To:** Kristie Ondracek  
**Subject:** FW: Tax Update Class

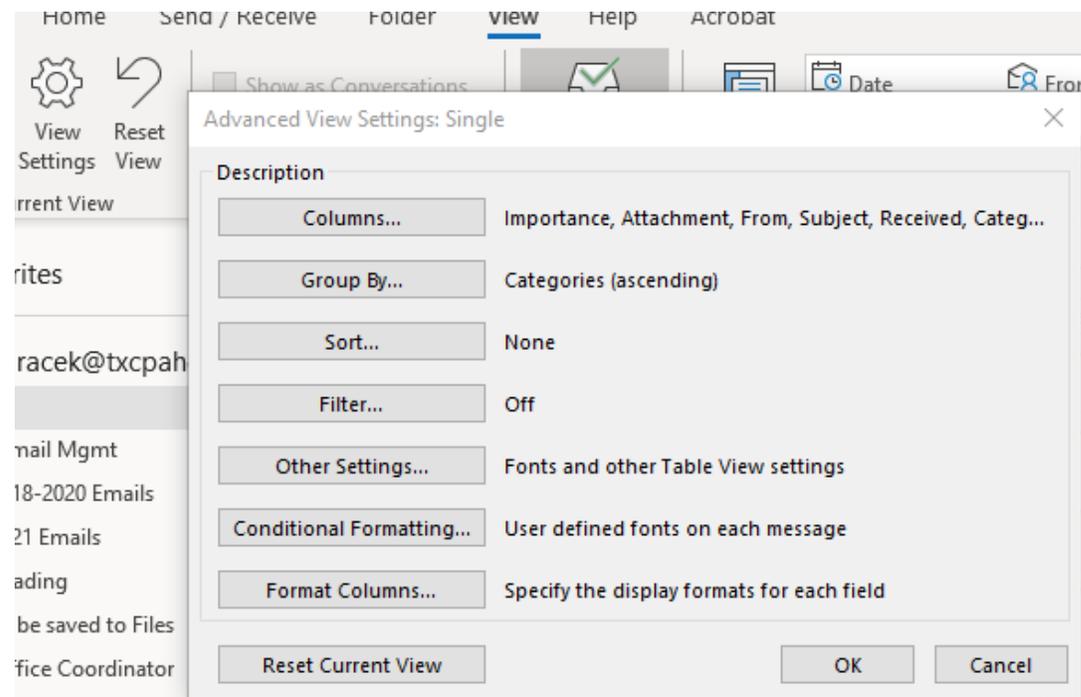
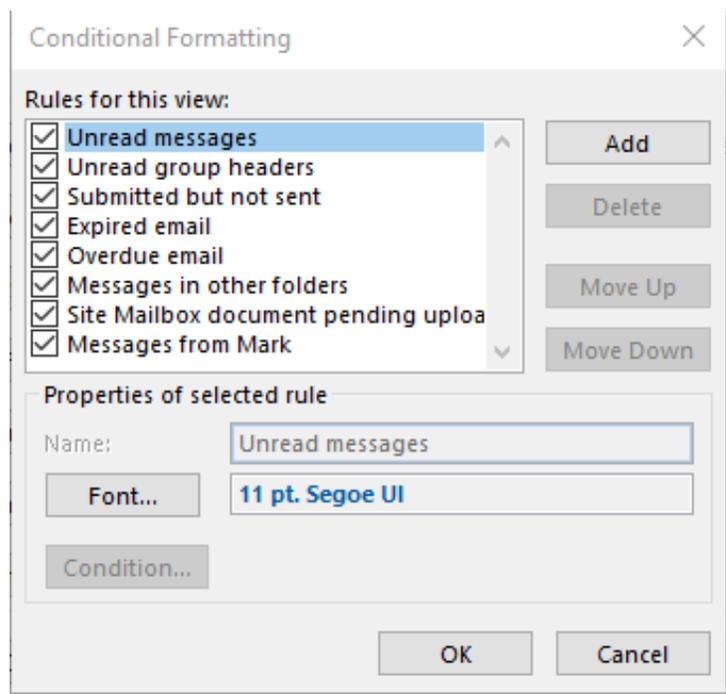
**Follow Up Flag:** Follow up  
**Flag Status:** Flagged

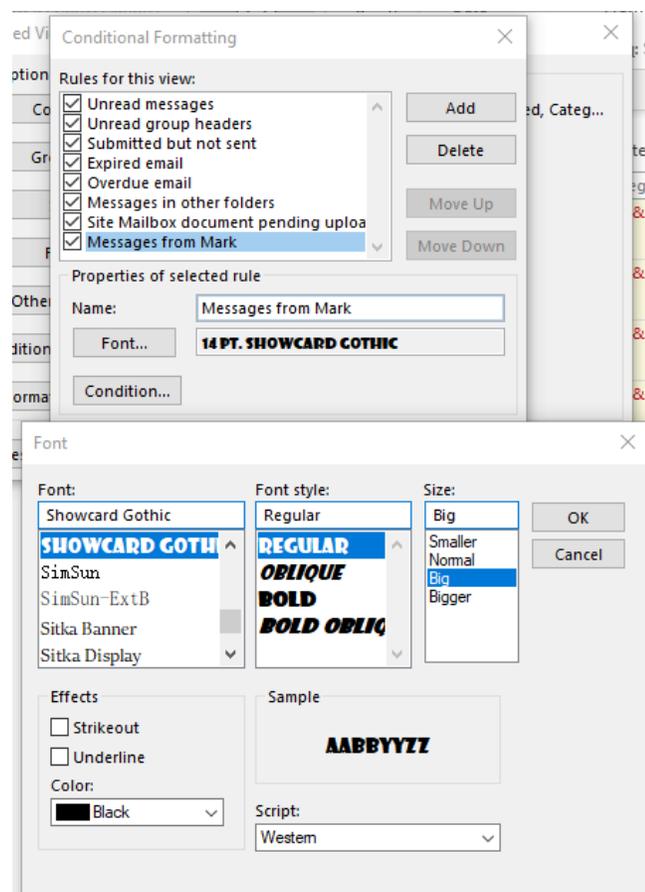
**Categories:** Accounting

The screenshot shows the Outlook 'Appointment' ribbon with the following options: Delete, Forward, Calendar, Schedule a Meeting, Teams Meeting, Meeting Notes, Invite Attendees, Show As: Busy, Reminder: 15 minutes, Recurrence, Categorize, High Importance, Low Importance, Dictate, and Insights. Below the ribbon, the appointment details are displayed:

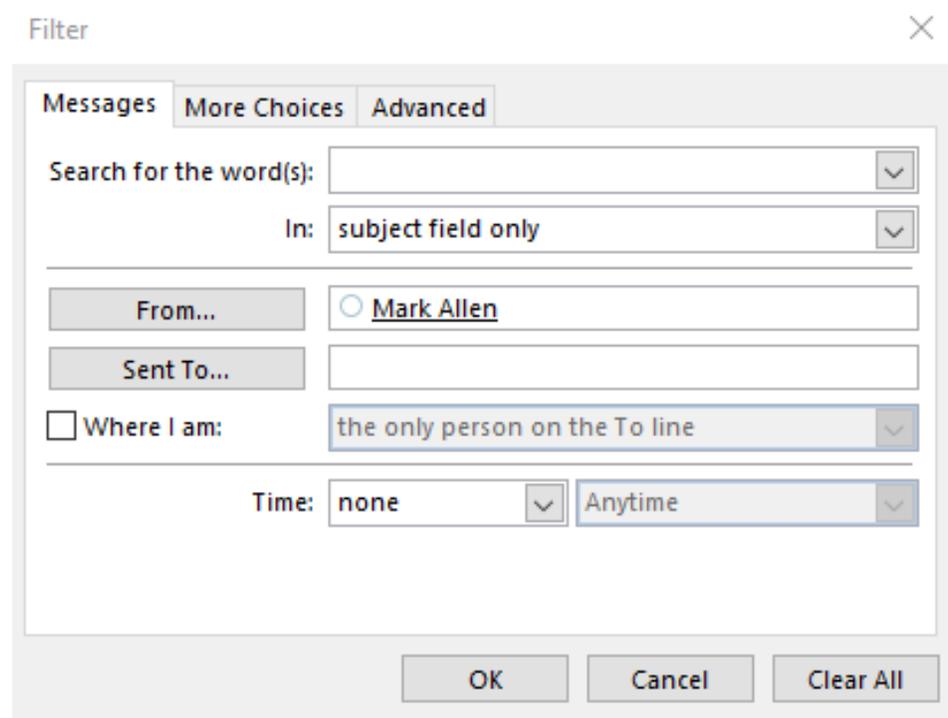
Title	Spots are filling up fast   WatchGuard Tech Tips & Tricks Webinar: <a href="#">AuthPoint External Identities - Azure Active Directory</a>	
Start time	Tue 6/1/2021 9:30 AM	<input type="checkbox"/> All day <input type="checkbox"/> Time zones
End time	Tue 6/1/2021 10:00 AM	<a href="#">Make Recurring</a>
Location		

# SO YOU WANT TO MAKE SURE THAT MESSAGE FROM YOUR BOSS STANDS OUT





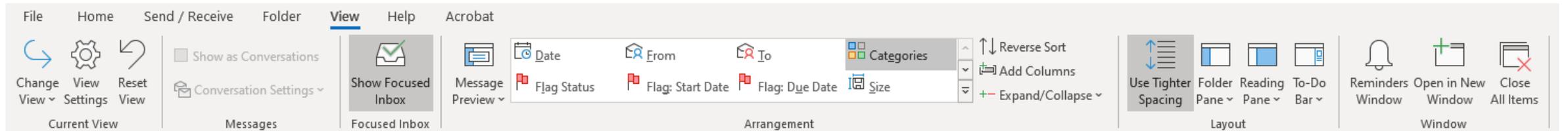
Conditions button:



# EXAMPLE OF CONDITIONAL FORMATTING

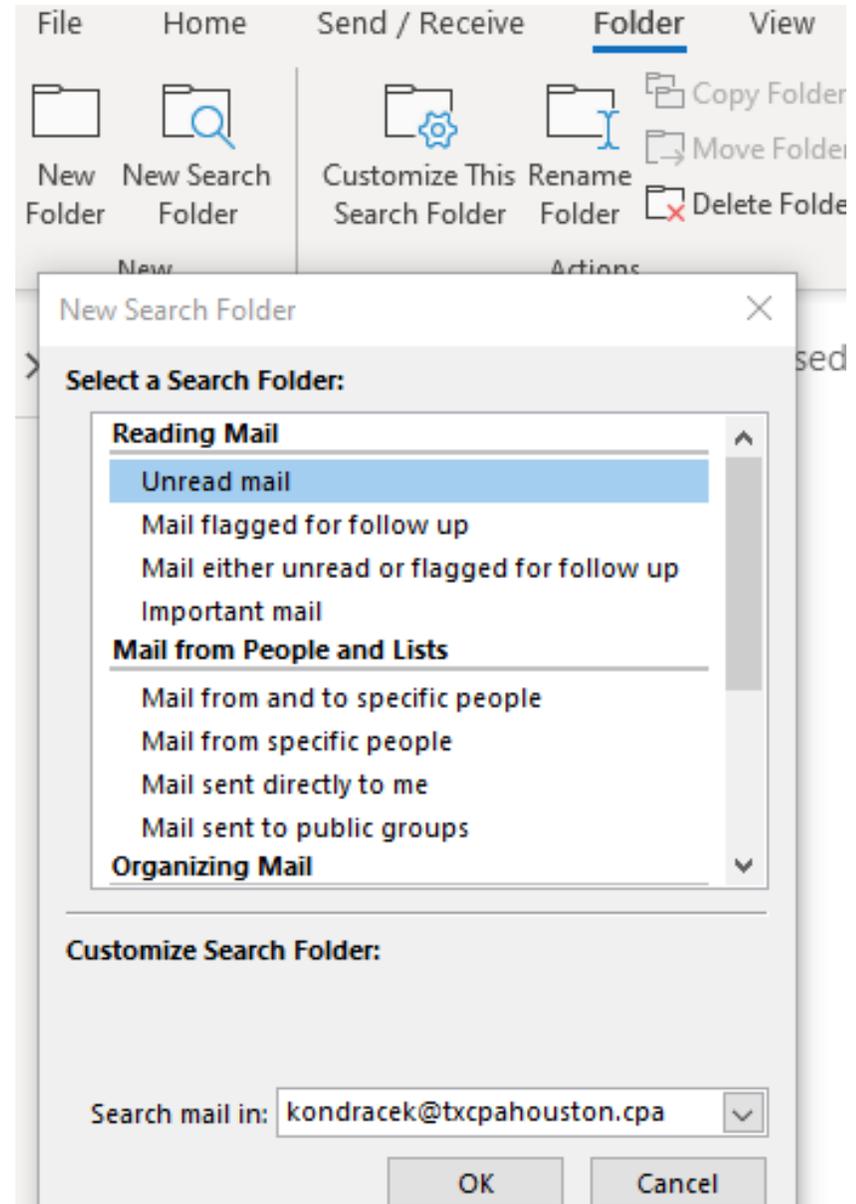
Result of the Formatting Rule:

**MARK AL... RE: TXCP... FRI 12/17/202..**



# MESSAGE PREVIEW

# SEARCH FOLDER



# OF COURSE, I WAS NOT WORKING THIS WEEKEND...

SENDING EMAILS OUT AT A FUTURE TIME OR DATE

The screenshot displays the Microsoft Outlook 'Options' ribbon and the 'Properties' dialog box for an email. The 'Options' ribbon includes sections for 'Show Fields' (Bcc, From), 'Encrypt', 'Tracking' (Request a Delivery Receipt, Request a Read Receipt, Use Voting Buttons), and 'More Options' (Save Sent Item To, Delay Delivery, Direct Replies To). The 'Properties' dialog box is open, showing 'Settings' (Importance: Normal, Sensitivity: Normal), 'Security' (Change security settings for this message, Security Settings...), 'Voting and Tracking options' (Use voting buttons, Request a delivery receipt for this message, Request a read receipt for this message), and 'Delivery options' (Have replies sent to, Do not deliver before: 1/4/2022 8:30 AM, Expires after: None 12:00 AM, Save copy of sent message). The email composition area shows the 'From' field as 'kondracek@txcpahouston.cpa' and the 'To' field as 'Kristie Ondracek'. The 'Subject' field is empty. The email body contains the TXCPA Houston logo and contact information for Kristie Ondracek, CPA, CGMA, including her title, phone numbers, and website.

File Message Insert **Options** Format Text Review Help Acrobat Tell me what you want to do

Themes Colors Page Color Themes Effects Themes

Show Fields Encrypt Tracking More Options

Request a Delivery Receipt Request a Read Receipt Use Voting Buttons Save Sent Item To Delay Delivery Direct Replies To

Send From: kondracek@txcpahouston.cpa To: Kristie Ondracek Cc: Bcc: Subject:

**Properties**

**Settings** Importance: Normal Sensitivity: Normal

**Security** Change security settings for this message. Security Settings...

Do not AutoArchive this item

**Voting and Tracking options**

Use voting buttons  Request a delivery receipt for this message  Request a read receipt for this message

**Delivery options**

Have replies sent to  Select Names...

Do not deliver before 1/4/2022 8:30 AM

Expires after None 12:00 AM

Save copy of sent message

Contacts... Categories: None

**TXCPA HOUSTON**

**Kristie Ondracek, CPA, CGMA**

Chief Financial Officer/Chief Operating Officer  
TXCPA Houston  
Direct: 832-831-9229  
Office: 713-622-7733  
Cell: 402-677-0455  
Website: [www.txcpahouston.cpa](http://www.txcpahouston.cpa)

f t in

# DO YOU LIKE COLOR AND VARIETY?

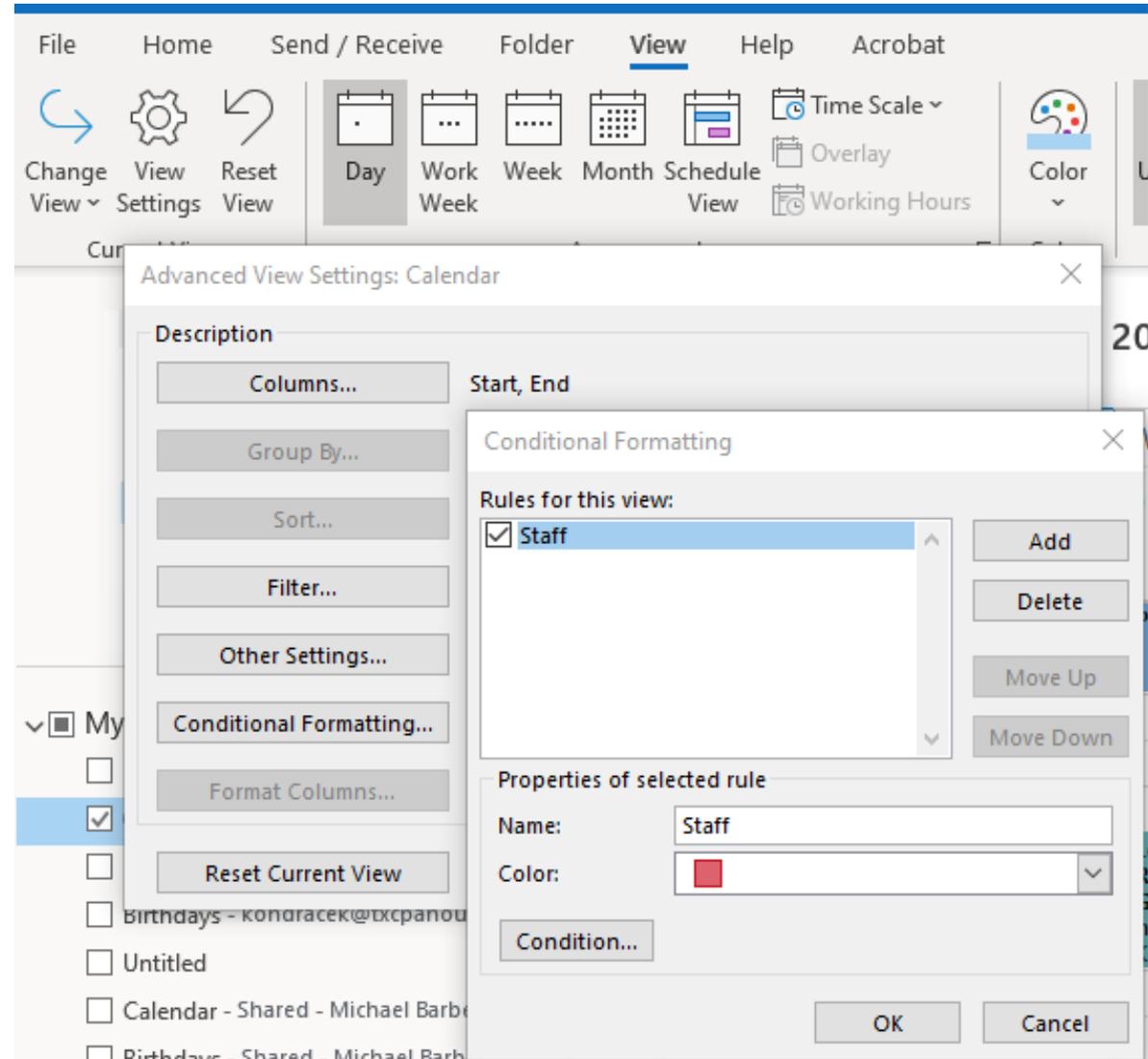
- Use your categories to help color code your calendar, tasks, and contacts

Today < > January 4 - 10, 2022

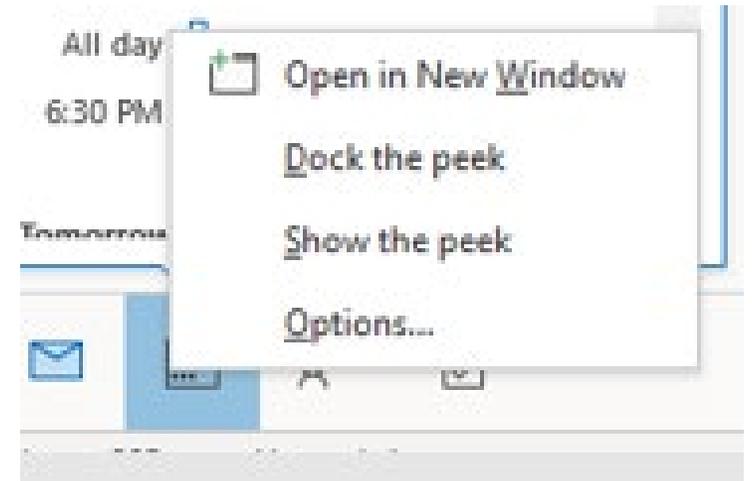
Tuesday		Wednesday	
4		5	
7 AM	Reset phones +1	Payables +1	Review e-blast ↻
3 AM			
3 AM			
3 AM			
3 AM	Arc of Katy ↻	LeadHE Rship Global https://Kend ↻	LeadH ERship https://Suza ↻
3 AM	Weekly Staff Meeting Microsoft Teams Meeting Mark Allen ↻	Mastering https://	Mastering https://
1 AM			
2 PM	Precious Fuller (promote coaching pro Zoom - Main Account Kristie Ondracek	Wednesday Webinar with Precious Fuller Zoom - CPE Account Kristie Ondracek	
1 PM	CHANGE YOUR https://bric Brigitte Boj	Webinar - 11 am PST	Arc of Katy ↻
2 PM			Travel
2 PM			Hair Appointment
3 PM			
4 PM	Run payroll ↻	Mastering Your Story https://us02web.zoom.us/j/82790967999?tk=HUmhsuqB0W6NE_JanAtgmM	
5 PM		TXCPA Houston Open House 777 Post Oak Blvd #500	Meditation with LaDonna ↻
5 PM		Kristie Ondracek This will be an in person activity. Please plan on	
7 PM			
3 PM			

# RECURRING MEETINGS WITH COLOR FORMATTING

- View tab
- View settings
- Conditional formatting
- Click Add
- Click condition
- Then going forward, any meeting will have that color code



# DO YOU EVER NEED MULTIPLE OUTLOOK WINDOWS OPEN?



# CALENDAR OPTIONS – WORK TIME SETTING

## Outlook Options

General	 Change the settings for calendars, meetings, and time zones.
Mail	
<b>Calendar</b>	<b>Work time</b>
Groups	 <b>Work hours:</b>
People	Start time: <input type="text" value="7:00 AM"/>
Tasks	End time: <input type="text" value="4:00 PM"/>
Search	Work week: <input type="checkbox"/> Sun <input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tue <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thu <input checked="" type="checkbox"/> Fri <input type="checkbox"/> Sat
Language	First day of week: <input type="text" value="Sunday"/>
Ease of Access	First week of year: <input type="text" value="Starts on Jan 1"/>

# CALENDAR OPTIONS – HOLIDAYS

## Calendar options



Add online meeting to all meetings ⓘ

Default duration for new appointments and meetings: 30 minutes ▾

End appointments and meetings early ⓘ

Less than one hour: 5 minutes ▾

One hour or longer: 10 minutes ▾

Default reminders: 15 minutes ▾

Allow attendees to propose new times for meetings

Use this response when proposing a new meeting time: ? Tentative ▾

Add holidays to the Calendar: [Add Holidays...](#)

Change the permissions for viewing Free/Busy information: [Free/Busy Options...](#) [Other Free/Busy...](#)

Enable an alternate calendar

English ▾ Gregorian ▾

When sending meeting requests outside of your organization, use the iCalendar format

Show bell icon on the calendar for appointments and meetings with reminders

Add Holidays to Calendar ✕

Select the locations whose holidays you would like copied to your Outlook Calendar:

- Tunisia
- Turkey
- Ukraine
- United Arab Emirates
- United Kingdom
- United States
- Uruguay
- Venezuela
- Vietnam
- Yemen

[OK](#) [Cancel](#)

# CALENDAR OPTIONS – TIME ZONES

## Time zones



Label:

Time zone:

(UTC-06:00) Central Time (US & Canada)



Show a second time zone

Label:

Time zone:

(UTC-08:00) Pacific Time (US & Canada)



Show a third time zone

Label:

Time zone:

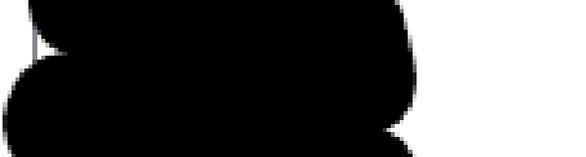
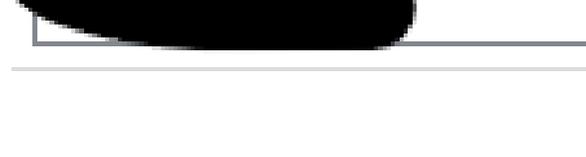
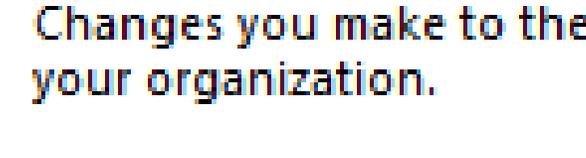
(UTC-12:00) International Date Line West



Swap Time Zones

General AutoArchive Permissions Synchronization

- Currently sharing with:

Name	Permission Level
My Organization	Can view when I'm busy
	Can view titles and locations
	Can view all details
	Can view titles and locations
	Can view all details
	Can view titles and locations

Add...

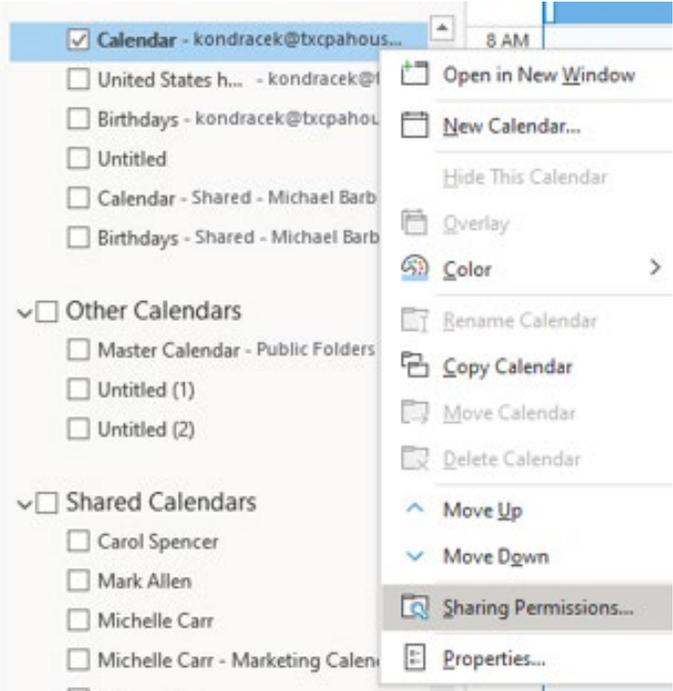
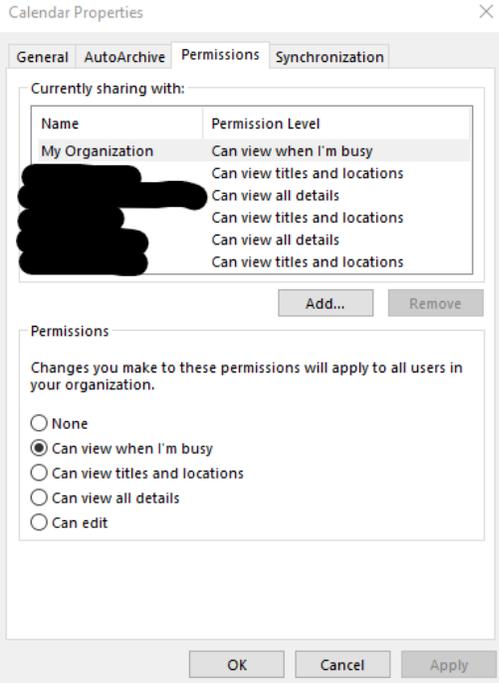
Remove

- Permissions

Changes you make to these permissions will apply to all users in your organization.

# SHARING CALENDARS

# SHARING CALENDARS



# OUTLOOK KEYBOARD SHORTCUTS



Link to Microsoft's page for Outlook shortcuts

Save	Ctrl + S
Print	Ctrl + P
Undo	Ctrl + Z
Cut	Ctrl + X
Copy	Ctrl + C
Paste	Ctrl + V
Check Spelling	F7
Check for Mail	F9
Save, Close & Send	Alt + S
Reply	Ctrl + R
Reply to All	Alt + L
Address Book	Ctrl + Shift + B
Help	F1
Switch Between Applications	Alt + Tab
New Item	Ctrl + N



## **MY OWN WAY OF BEING THE BOSS OF MY EMAIL**

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Use flags

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Categories

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Filtering

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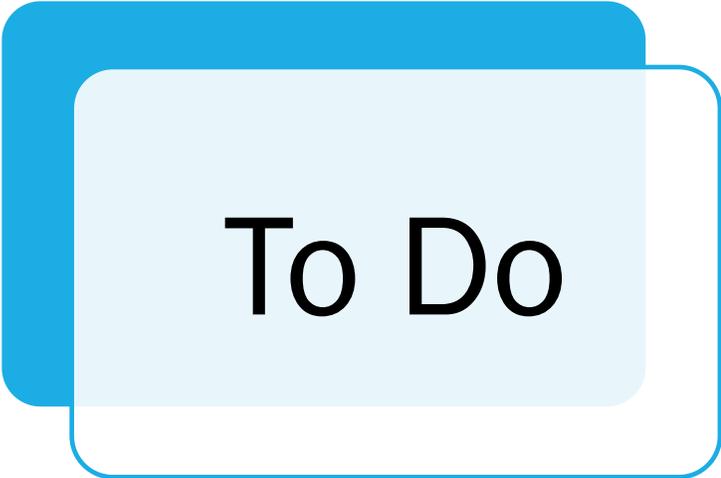
Time block

---

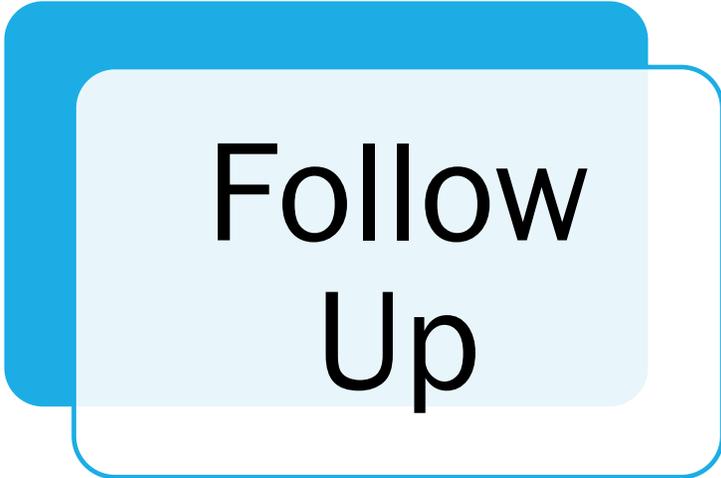
Quick hits

---

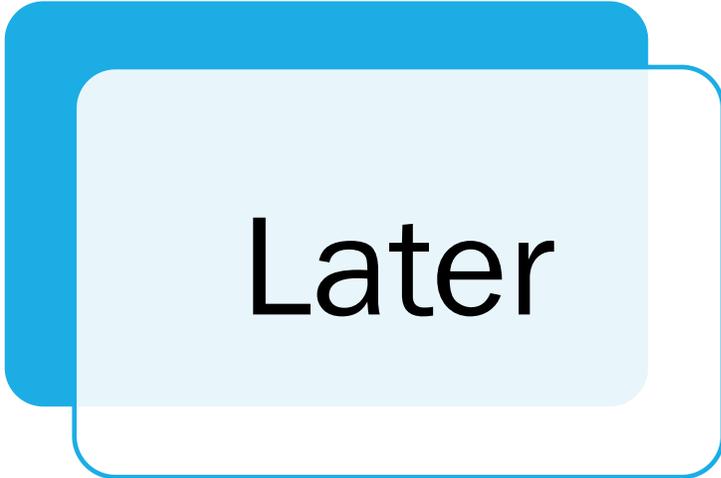
## USE OF FOLDERS – EXAMPLE BY PRIORITY

A folder icon with a blue top flap and a light blue body, containing the text "To Do".

To Do

A folder icon with a blue top flap and a light blue body, containing the text "Follow Up".

Follow  
Up

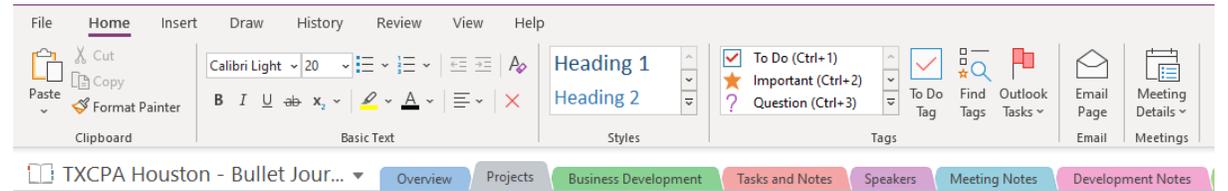
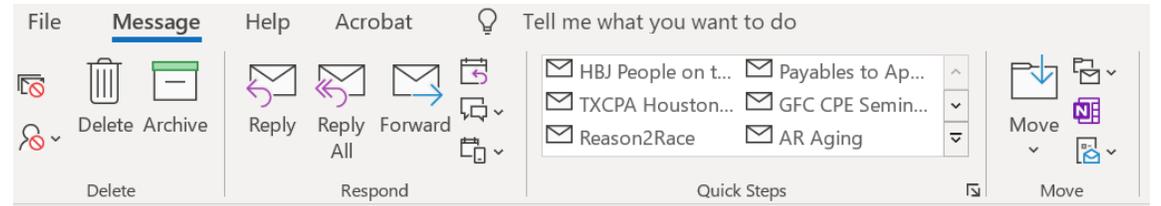
A folder icon with a blue top flap and a light blue body, containing the text "Later".

Later

# THINGS TO KEEP IN MIND

- Only reply when necessary
- Don't overthink the reply
- It's ok to unsubscribe
- Delete button is your friend

# ONENOTE INTEGRATIONS

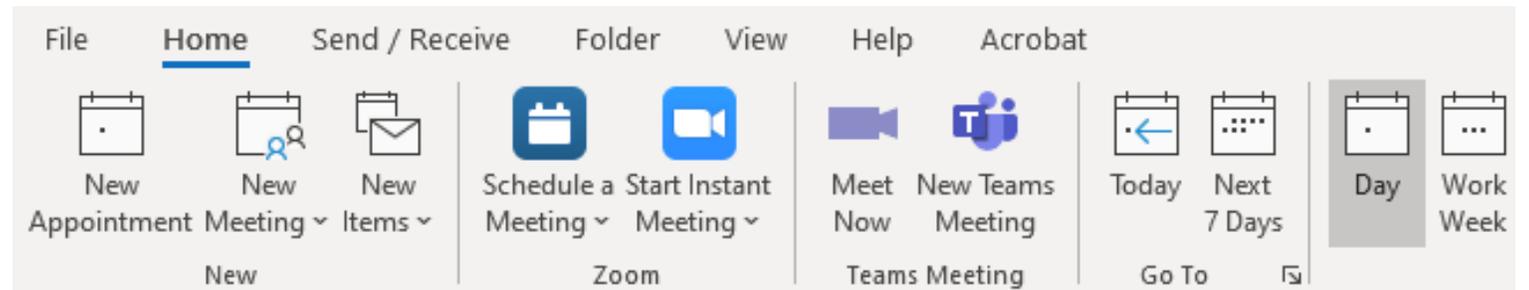


Send out emails to CHS & Accounting Schol Committees  
about participating in the Reason2Race fundraisers

Thursday, December 30, 2021 12:06 PM

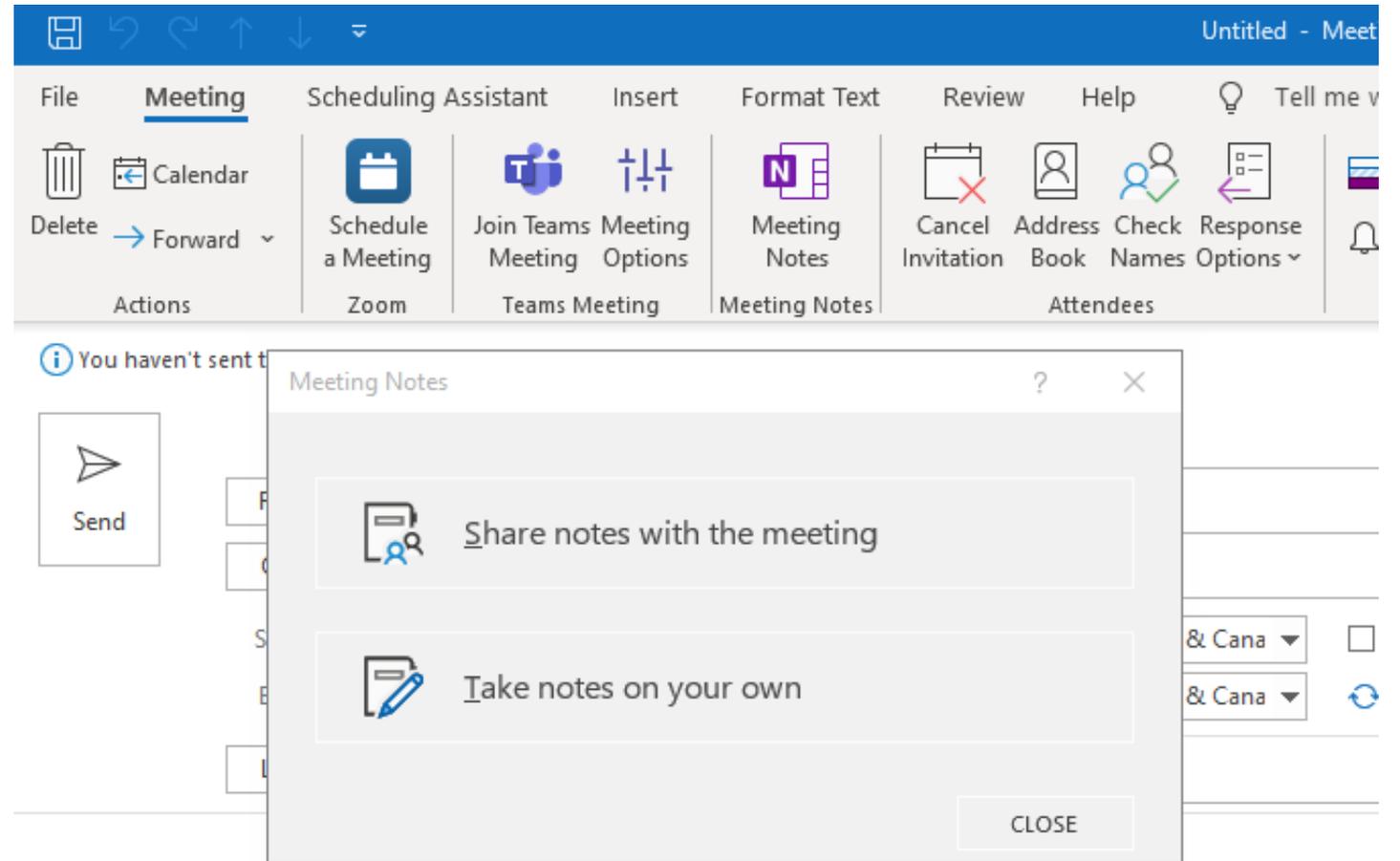
# TEAMS/ZOOM INTEGRATION

- Within an appointment, you can select Teams meeting and it will automatically place the link to the Teams meeting there.
- This also works with Zoom if you have the add in on your Outlook application

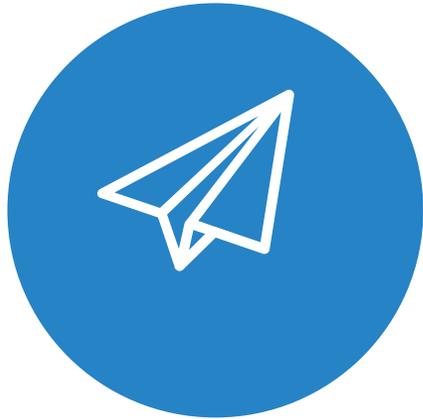


# BONUS: TEAMS/OUTLOOK CALENDAR MEETING

- You can take meeting notes on the calendar invite and then share save it in OneNote.
- Within OneNote you will be able to share with others on the team or just have the notes for yourself.



Any  
Questions



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PHONE: 402-677-0455



SET UP A MEETING: