

Outlook Tips & Tricks To Save You Time



Presented by
John H. Higgins, CPA.CITP
CPA Crossings, LLC

John H. Higgins, CPA.CITP Strategic Technology Advisor



jhiggins@cpacrossings.com

Strategic technology advisor to the profession w/ 35+ years of experience

Nationally recognized author and presenter on CPA technology

Former National Mid-market Technology Partner - BDO

Cygnus Media Top 25 Thought Leader for the profession

AICPA Business & Industry Hall of Fame Inductee

MICPA Innovative User of Technology Award

Past Chair of the Michigan Association of CPAs

Passionate advocate for the CPA profession!



Learning Goals

After attending this presentation, you will ...

- identify multiple time saving tips for working in Outlook that you can use immediately.

Presentation Outline

- Quick Parts
- Dictation
- Share to Teams
- Send to OneNote
- Rules / Folders / Favorites
- Category Coding
- Tag for Follow Up



Quick Parts

The screenshot displays the Microsoft Word interface with a message template. The Building Blocks Organizer dialog box is open, showing a list of building blocks. The 'Bookings link' block is selected, and its preview is visible on the right side of the dialog. The preview text reads: "Please use this link to review my schedule and book a time for a call that is convenient for you." The dialog box also includes buttons for 'Edit Properties...', 'Delete', 'Insert', and 'Close'.

Name	Gallery	Category
Webinar Question	Quick Parts	General
Bookings link	Quick Parts	General
New SME Welcome	Quick Parts	General
2023 SME Course Selection	Quick Parts	General

Best regards,
John H. Higgins, CPA, CITP | Chief Partnership Officer
CPA Crossings, LLC | (248) 963-0640
Connect with us:
CPACrossings.com | [LinkedIn](#) | [Twitter](#)

Dictation

The screenshot shows the Microsoft Word interface for composing an email. The ribbon includes File, Message, Insert, Draw, Options, Format Text, Review, Help, and Acrobat. The Dictate button is visible in the Voice group. A 'Dictation Settings' dialog box is open, showing the following options:

- Spoken language: English (United States)
- Microphone: Transmit (2- Plantronics Savi 7xx-M)
- Microphone status: 10 bars, with a [Microphone problems?](#) link.
- Enable auto-punctuation: Off
- Filter sensitive phrases: On

Buttons for 'Save' and 'Cancel' are at the bottom right of the dialog. The email content area shows 'Best regards,' followed by the signature of John H. Higgins, CPA.CITP, Chief Partnership Officer at CPA Crossings, LLC.

Share To Teams

MICPA/West Oakland Educational Meeting: Tuesday May 23, 8am-10am, 2 A&A Credits, \$35 (Bitcoin - Opportunities and Risk for Investors & Challenges for Small Business)

File Message Help Acrobat

Delete Archive Reply Reply Forward All Respond Teams

! Cisco WebEx N... Move to Office... Rachel - Ok to p... To Manager Team Email Done Quick Steps Move Assign Policy Categorize Follow Up Tags Editing Immers

MICPA/West Oakland Educational Meeting: Tuesday May 23, 8am-10am, 2 A&A Credits, \$35 (Bitcoin - Opportunities and Risk for Investors & Challenges for Small Business)

AK Ari Katz <westoaklandcpas@gmail.com>

To

If there are problems with how this message was received, click here.

MMG 05-23-2023 Flyer.pdf 30 KB

CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

Hello Everyone,

Please add this email to your safe senders list to avoid communications going to spam, junk or secondary folders: westoaklandcpas@gmail.com.

We're looking forward to seeing you at the **and Risk for Investors & Challenges for Small Business**

Our Speaker:
William (Bill) Greshak, Professor, Finance

Please RSVP so we can plan accordingly with

Reminder - Meeting materials and present

Upcoming Meetings:
TBD

Thanks,
Ari

Ari Katz, MBA
West Oakland Small Practitioners Group
MICPA Endorsed and Supported
2023-05-23 10:11 AM

Share to Teams

Share to Microsoft Teams

Share to

MICPA

Channels

- SM MICPA Subject Matter Experts (SMEs)
- DP Michigan - MICPA Distribution Partners
- CC MICPA CPA Crossings SMEs (External)

Mon, Apr 24, 2023 6:18 PM

CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

Hello Everyone.

Please add this email to your safe senders list to avoid communications going to spam, junk or secondary folders: westoaklandcpas@gmail.com.

Include attachments

Send To OneNote

The screenshot shows an Outlook window with the following details:

- Title Bar:** MICPA/West Oakland Educational Meeting: Tuesday May 23, 8am-10am, 2 A&A Credits, \$35 (Bitcoin - Opportunities and Risk for Investors & Challenges for Accountants) - Message (HTML)
- Toolbar:** Includes File, Message, Help, Acrobat, and various actions like Delete, Archive, Reply, Forward, Share to Teams, Move, Tags, Editing, Immersive, Language, Zoom, Find Time, Send to OneNote, Report Message, and Viva Insights.
- Email Content:**
 - From:** Ari Katz <westoaklandcpas@gmail.com>
 - Subject:** MICPA/West Oakland Educational Meeting: Tuesday May 23, 8am-10am, 2 A&A Credits, \$35 (Bitcoin - Opportunities and Risk for Investors & ...)
 - Attachment:** MMG 05-23-2023 Flyer.pdf (30 KB)
 - Warning:** CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.
 - Body Text:**

Hello Everyone,

Please add this email to your safe senders list to avoid communications going to spam, junk or secondary folders: westoaklandcpas@gmail.com.

We're looking forward to seeing you at the next West Oakland CPA Monthly Meeting Group at the Costick Activities Center in Farmington Hills: Tuesday, May 23, 8-10am. Please review the attached flyer (**2.0 Accounting & Auditing: Bitcoin – Opportunities and Risk for Investors & Challenges for Accountants and Central Bankers; \$35**).

Our Speaker:
William (Bill) Greshak, Professor, Finance & Economics, Walsh College

Please RSVP so we can plan accordingly with seating and food. Our meetings always include a complimentary expanded Continental Breakfast.

Reminder - Meeting materials and presentations will be emailed to RSVP's prior to the meeting.

Upcoming Meetings:
TBD

Thanks,
- Send to OneNote Dialog:** A sidebar on the right titled "Send to OneNote" is open, showing a list of OneNote locations to save the email to. The list includes "Subject Matter Experts (SMEs) Noteb...", "Distribution Partners Template for O...", "AICPA", "Alabama", "Alaska", "Arizona", "Arkansas", "Bermuda", and "California". "Save" and "Cancel" buttons are at the bottom.

Rules / Folders / Favorites

The screenshot displays the Outlook interface with the 'Folder' ribbon selected. The ribbon includes options like 'New Folder', 'New Search Folder', 'Rename Folder', 'Copy Folder', 'Move Folder', 'Delete Folder', 'Mark All as Read', 'Run Rules Now', 'Show All Folders A to Z', 'Clean Up Folder', 'Delete All', and 'Recover Deleted Items'. The left sidebar shows a list of folders, with 'Inbox' selected. The main pane shows an email list with columns for 'Sender' and 'Subject'. A 'Create Rule' dialog box is open, showing conditions for a rule: 'When I get email with all of the selected conditions', 'From Dan Koontz', 'Subject contains Webinar Template Upload', and 'Sent to me only'. The 'Do the following' section includes options for 'Display in the New Item Alert window', 'Play a selected sound', and 'Move the item to folder' (set to 'CPA Crossings Repo').

Sender	Subject	Received
Tonna Hollis	RE: Webinar Template Upload	Fri 4/21/
Dan Koontz	Re: Webinar Template Upload	Fri 4/21/
Darnell Coney		Fri 4/21/
Anna Durst		Fri 4/21/
Kim Mick		Fri 4/21/
Lisa Bugryn		Fri 4/21/
Tonna Hollis		Fri 4/21/
Gayle Floresca		Fri 4/21/

Create Rule

When I get email with all of the selected conditions

- From Dan Koontz
- Subject contains Webinar Template Upload
- Sent to me only

Do the following

- Display in the New Item Alert window
- Play a selected sound: Windows Notify Em [Browse...]
- Move the item to folder: CPA Crossings Repo [Select Folder...]

OK Cancel Advanced Options...

Category Coding

The screenshot shows an Outlook Appointment Book window titled 'Appointment'. The interface includes a menu bar (Folder, View, Help, Acrobat), a ribbon with 'Appointment' selected, and various options like 'Show As: Busy', 'Reminder: 30 minutes', and 'Categorize'. The main view is a calendar for Thursday, April 27, 2023, showing a grid of appointments from 9 AM to 2 PM. A 'Color Categories' dialog box is open in the foreground, listing various categories with checkboxes and a color selection tool.

Color Categories Dialog Box:

- Communications Director
- Compliance Mitigation Replay
- Conference
- Conference Director
- Contract Signed
- Convergence Coaching
- CPAX Replay
- CPAX3 EVENT CENTER
- CPE Course Development
- CPE Director
- CPE Support
- DataPoint Solutions Replay

Calendar Appointments (Approximate):

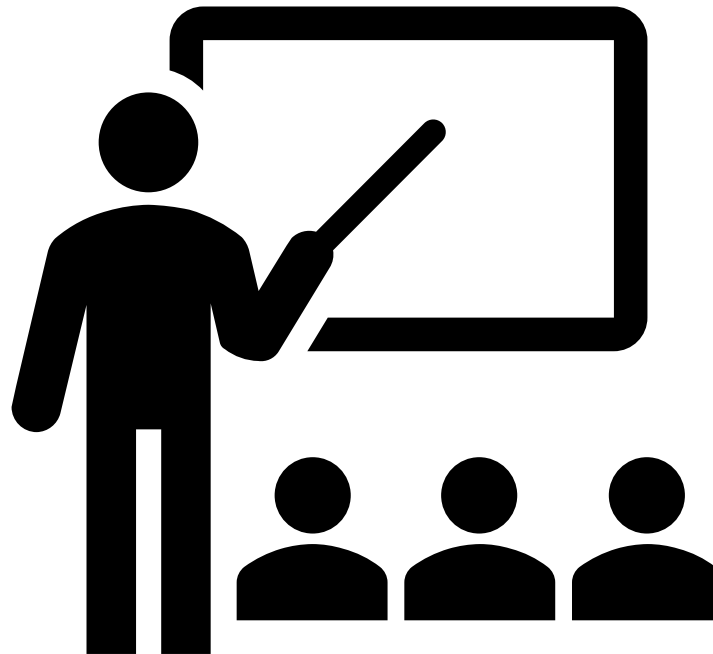
Time	Appointment 1	Appointment 2	Appointment 3	Appointment 4	Appointment 5	Appointment 6	Appointment 7	Appointment 8
9 AM - 10 AM	WHPERHC8 Sydney Moderates CPAX Webinars	WHPERHC8 Walter Haig's Personal Financial Health Checkup Walter J. Haig cpax3 Training Center	EJDERL4 Charlotte Moderates CPAX Webinars	EJDERL4 Cases in Corporate Ethics: Discuss Real Life Conflicts John L. Daly cpax Training Center	CHCHMBB2 Sydney Moderates CPAX Webinars			
10 AM - 11 AM								
11 AM - 12 PM					CEGWBFC2 Charlotte Moderates CPAX Webinars	CEGWBFC2 Breaking Free of the CPA Box Garrett Wagner cpax Training Center	Financial Reporting and Audits Jennifer Louis cpax3 Training Center	CPAX Webinars for Accountants Garrett Wasny cpax Training Center
12 PM - 1 PM			TGTGNPF2 Shelly Moderates CPAX Webinars	TGTGNPF2 The New Psychology of Fraud with Dr. Toby Groves Toby Groves cpax3 Training Center			CUSDBGD2 Shelly Moderates CPAX Webinars	CUSDBGD2 Beginners Guide To Decentralized Finance (DeFi) Sonia Dumas cpax3 Training Center
1 PM - 2 PM					EGBWCQH2	EGBWCQH2		

Tag for Follow Up

The screenshot displays the Microsoft Outlook interface. The top ribbon includes sections for Quick Steps, Move, Tags, Groups, Find, Speech, and Language. The 'Tags' section is active, showing a dropdown menu with options: Assign Policy, Unread/Read, Categorize, and Follow Up. The 'Follow Up' dropdown menu is open, listing the following options: Today, Tomorrow, This Week, Next Week, No Date, Custom..., Add Reminder..., Mark Complete, Clear Flag, Set Quick Click..., and Set Quick Actions... The background shows an email list with columns for Subject, Date, and Time.

Subject	Date	Time
Re: Use this link for uploading	4/24/2023	7:45 AM
Saturday Morning Hockey (4-29-23)	4/24/2023	6:52 AM
[CPAX 365 Office 365 Training] Son...	4/23/2023	9:35 PM
Your campaign The latest courses fo...	4/23/2023	10:01 AM
[CPAX 365 Office 365 Training] Son...	4/23/2023	9:40 AM
Management Association All-Member Community Digest for S...	4/23/2023	7:02 AM
Management Association All-Member Community Digest for F...	4/22/2023	7:03 AM
oleman Re: Webinar Template Upload	4/21/2023	7:30 PM

WRAP-UP



Presentation Wrap-Up

- Time saving feature in Outlook are abundant
- Find 15 minutes each week to explore them
- Focus on tasks that you are doing repetitively

Questions ?



THANK YOU!

We hope you enjoyed this presentation. To learn more about CPA Crossings visit www.cpacrossings.com

