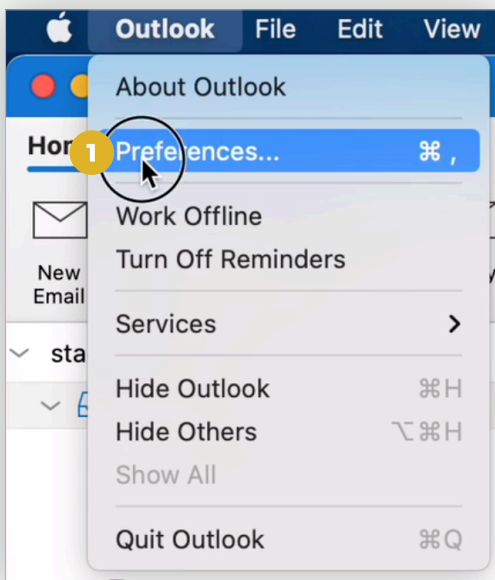




This guide includes everything you need to set up Outlook for Mac for the Stack Method™.

1 SET UP YOUR ENVIRONMENT

- Turn off all notifications.



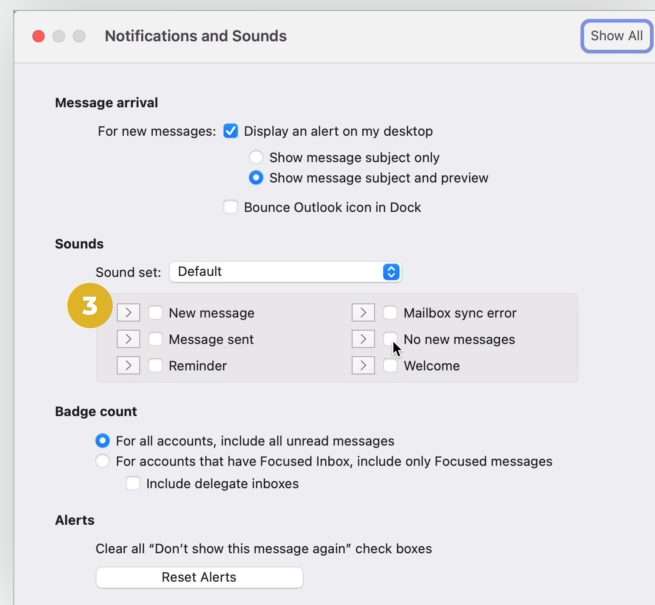
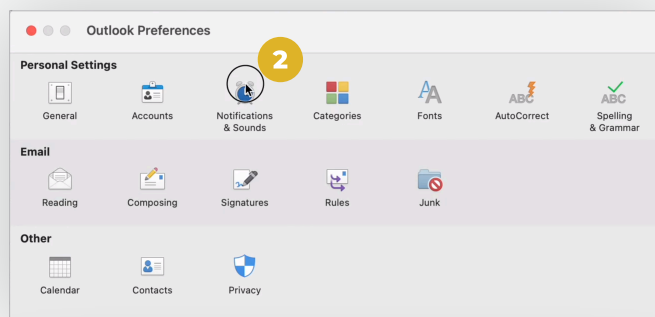
Click the icon Outlook at the top of your screen, then select *Preferences* and *Notifications & Sounds* in the settings menu.

From there you can turn off all the sounds options. Make sure you turn them off on your phone and other devices.

Breathe. You'll be ok.

Notifications distract your thinking and limit your potential.

Turn your notifications off on your phone, desktop and other devices so you can focus on the work at hand.



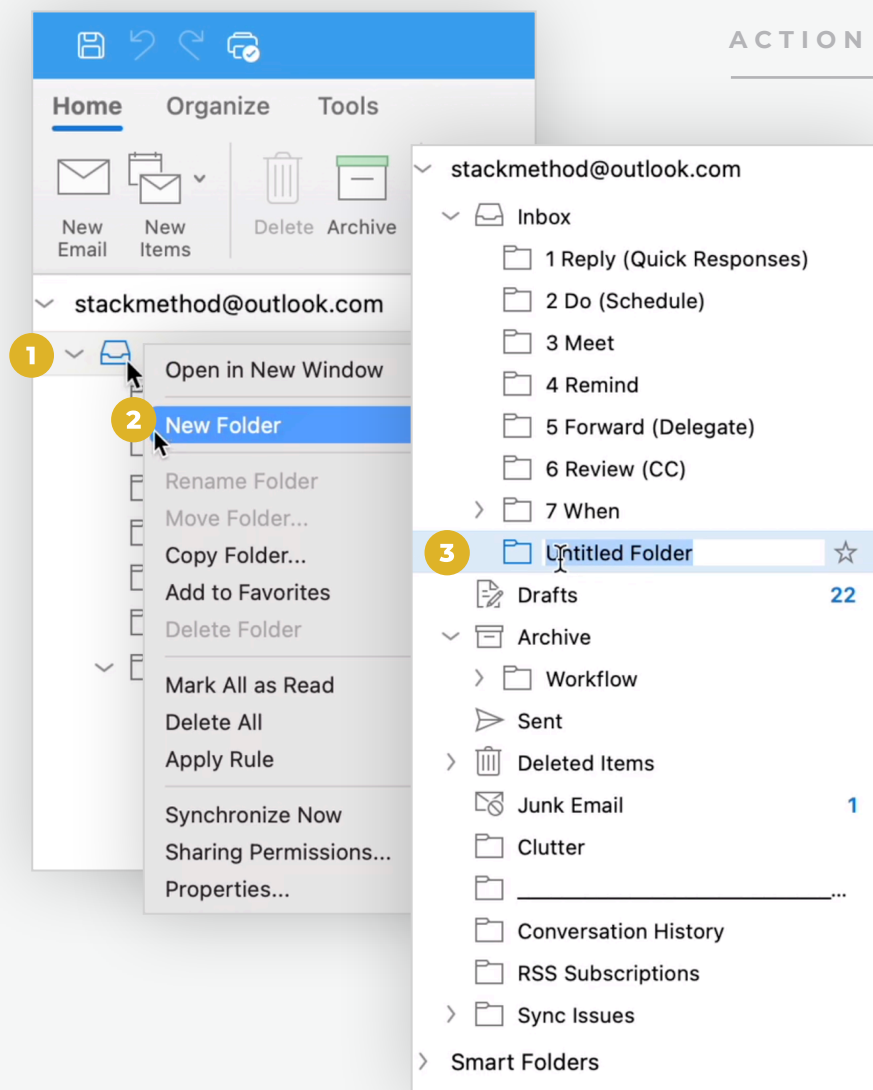


2 CREATE YOUR FOLDERS

Create your action folders.

It's time to create your action folders. Do not feel like you need to use our recommended set - feel free to experiment as you go along.

In your Outlook sidebar, right-click on the Inbox drop down, and then select *New Folder*, you can then name your action folders based on your needs. We do recommend that you have at least *Do* and *Remind* folder. And make sure the folders have numbers!



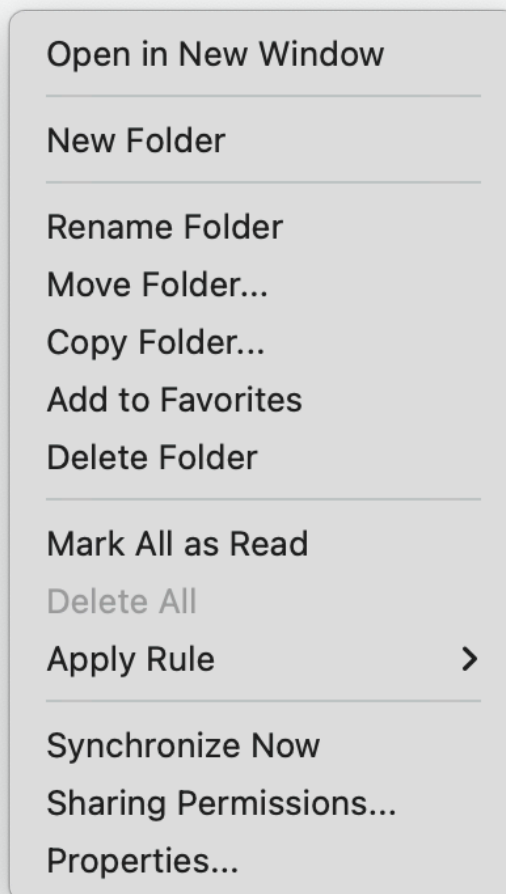
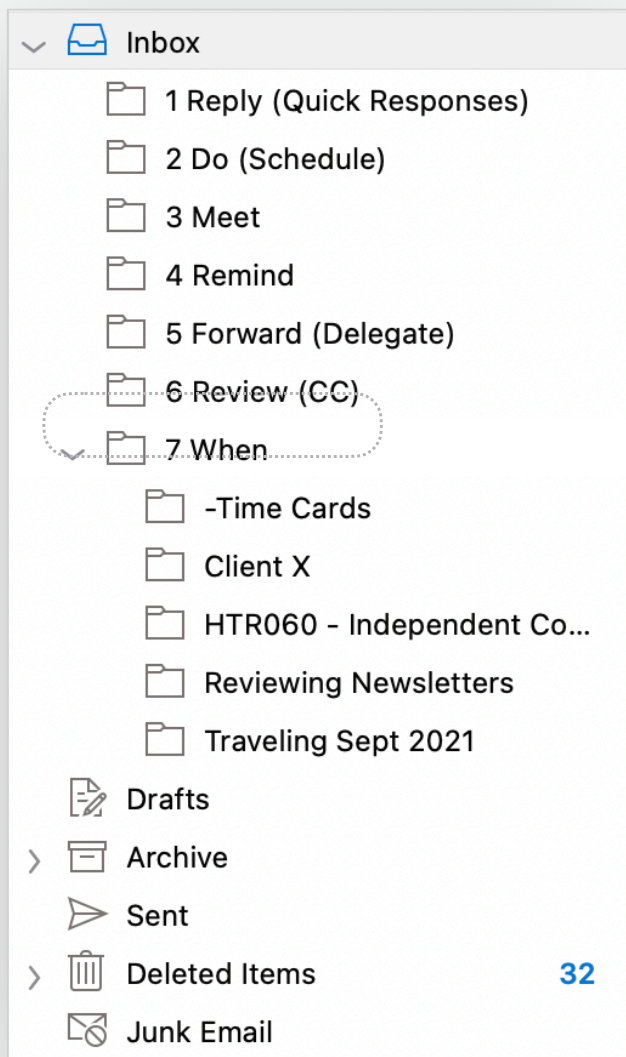
ACTION FOLDER EXAMPLES

- Invoice
- Revise
- Trade
- Sign
- Schedule
- Plan
- Transfer
- File
- Reschedule
- Read
- Pay
- Delegate
- Approve



Create your When folders.

When folders are for active projects or topics that you want to quickly and easily reference. Try to limit your When folders to just the most important folders you need.



Start by moving folders you currently use to the When section or create new ones for things you know you need.

(Don't use numbers to start the name of the folder).

You can easily move your emails by clicking **CTRL + SHIFT + V** and start typing the first letter of the folder name (In this example we use Tr for Traveling Sept 2021) and click Return *(Make sure the When folder drop down is expanded.)*



3 SCHEDULE STACKING TIME

Create recurring calendar entries.

Blocking out time to Stack helps you build the habit and ensures that you email when it's time to email, and do your other work when it's time to do that work. To set up recurring calendar sessions, follow the steps below:

1. Click on your calendar and create a new appointment

It's easiest if you click on the date and time (or approximate time) you would like to create an entry.

2. Title your calendar entry

We recommend you label your longer session as "Stack: Folders" and your shorter sessions as "Stack: Inbox".

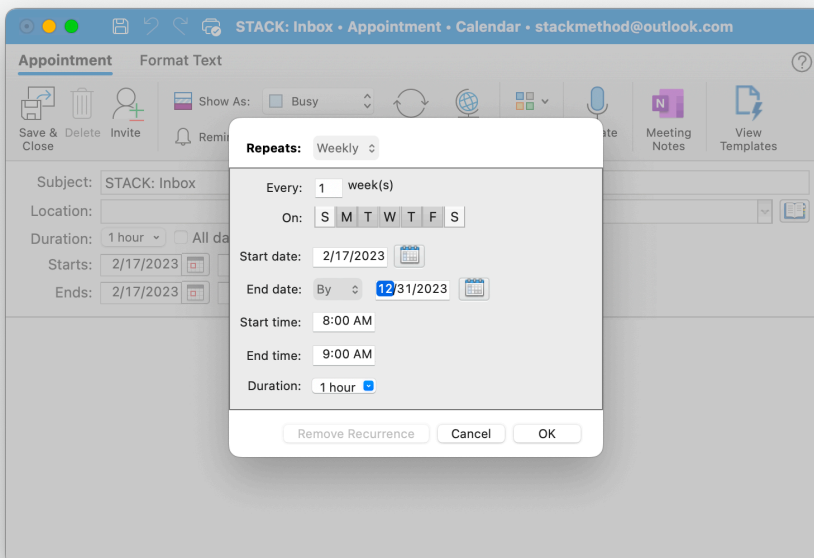
"Stack: Folders" will be your time slot to empty your inbox into your action folders and work through your action folders. This will typically be a longer 1 hour session.

"Stack: Inbox" will be a shorter time slot to work through your inbox and answer emails directly out of your inbox.

These fields are located under the main menu bar on the left side. Save the calendar entry.

3. Set your event to recur

Double-click the calendar entry. In the top menu select *Recurring*, then set it to recur by selecting "MTWTF".



4. Admire your calendar!

This is also a good time to check and make sure you saved the correct date/time. If you notice that the date or time is incorrect, you can click and drag this block to the correct date and time, or you can edit this by double clicking on the entry.

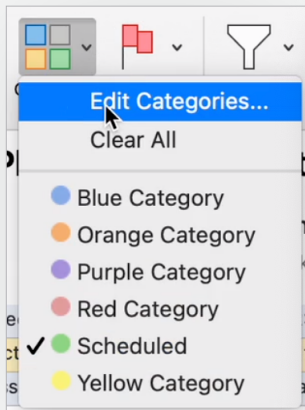


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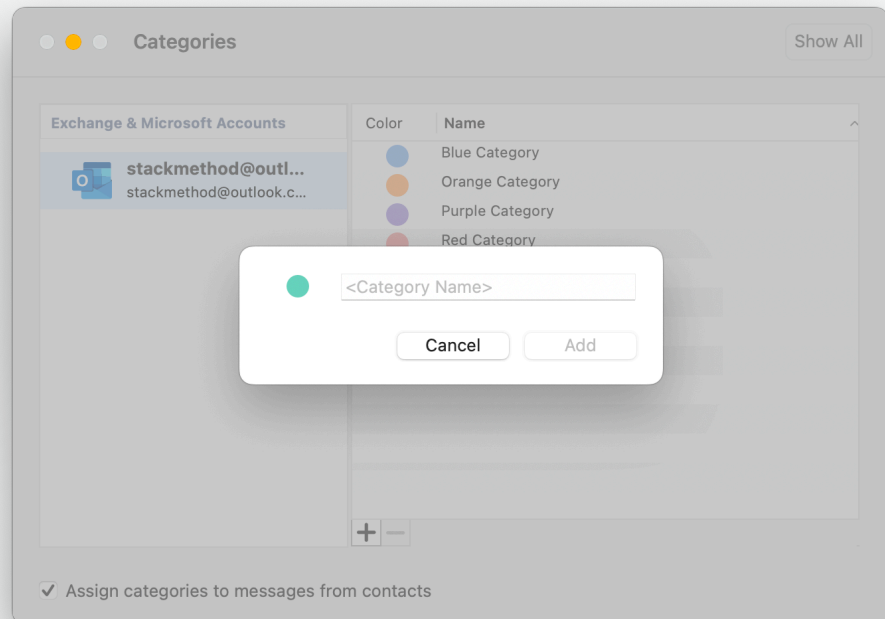
PRACTICE SCHEDULING DO'S

- Schedule your effort emails in your calendar.

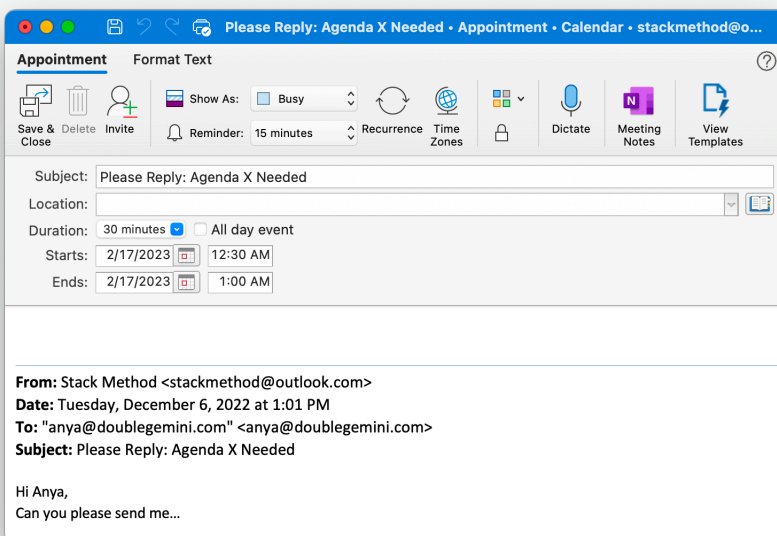
Scheduling “Do’s” (effort emails) will help you process the remainder of your emails much faster, and reduces the feeling of overwhelm by helping you proactively deal with these types of actions.



Start by creating a category by clicking on *Categorize* in the home ribbon and select *Edit Categories*.



Click on the **+** sign and select the color and name of the category which in this case will be *Scheduled*. Go to your “Do (Schedule)” folder and select the email you want to schedule, then click on *Categorize* and select the *Scheduled* category you just created.



You can confirm it has been labeled as *Schedule* with a tag that will show next to the email subject and a green label in the email.

Then, select the email you want to schedule and drag it to the calendar icon at the bottom left corner, this will pop an appointment window.

Place the words “DO:” in front of the subject, edit the time and date to work on this task.



5 IT'S TIME TO ARCHIVE

- Clear old emails out of your inbox.


A cluttered inbox will lead to a cluttered mind!

To start out on the best foot, you'll want to archive all emails older than three weeks. The best way to clear old emails out of your inbox in Outlook is to archive 1000 at a time. These emails can always be found in your "Archive" folder.

- Account
 - Attachments
 - Categories
 - Conversations
 - ✓ Date Received
 - Date Sent
 - Flag Status
 - Folder
 - From
 - Mentions (@)
 - Priority
 - Size
 - Status
 - Subject
 - To
-
- ✓ Oldest on Top
 - Newest on Top
-
- ✓ Show in Groups
-
- Expand All Groups
 - Collapse All Groups
-
- Restore to Defaults
 - Make This the Default View

Start by sorting the emails by *Date Received* and place the *Oldest on Top*.

Individually select emails while holding down the CTRL button, or by selecting an entire string of emails by clicking the email at the top, holding the Shift key, and selecting the email at the bottom.

Once you've selected a substantial group of emails, hit the Outlook Archive button. 

Remember, this will not delete your messages. It will simply move them from your inbox to your archive folder - you can still search for these old emails if you need to find them in the future. Continue this process until your inbox is clear of all old emails.

- Archive any unused folders

This is a great time to clean up any archive or storage folders you created before applying the Stack Method™. You'll want to review the messages in these folders and archive them following the same process above. Once these folders have been emptied, archive or delete the folder to remove it from your sidebar.

This will ensure you're working with your Action, Archive, and Active folders, and no longer relying on a complicated storage folder system.



6 EMAILS WITH THREADS

Group conversations threads.

Making sure emails are connected is key to stacking.

Let's group our conversation threads so nothing in our inbox is loose and lost.

Start by going to the *View* tab in the home ribbon and select the checkbox *Show as Conversations*.

Once done, click *Conversation Settings* and then enable *Show Messages from Other Folders* and *Show Senders Above the Subject*.

This will group all of your conversation threads even if you've moved previous messages to other folders.

- Account
- Attachments
- Categories
- 1 ✓ Conversations
- Date Received
- Date Sent
- Flag Status
- Folder
- From
- Mentions (@)
- Priority
- Size
- Status
- Subject
- To

- Oldest on Top
- 2 ✓ Newest on Top

- 3 ✓ Show in Groups

- Expand All Groups
- Collapse All Groups

- Restore to Defaults
- Make This the Default View

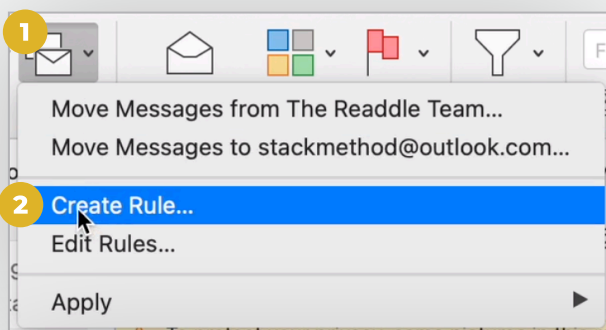


7 PRACTICE SETTING UP RULES

Set up and customize your rules.

Rules keep unwanted emails out of your inbox. We highly recommend you use this feature to get at least your newsletters, receipts, and other unwanted emails out of your way and into your Review folder, or archive.

Select *Rules* in the home ribbon and select *Create Rule*. This will take you to a pop up where you will be able to select the criteria you want for that rule. Then, select *Move the item to folder* under the “Do the following” section, and choose the folder you’d like for that criteria.



You can always select *Advanced Options* to add more criteria to a rule.

In order to apply the rule you just created to your current emails in your inbox, go to the *Rules* section in the home ribbon and click on the rule you just created.

