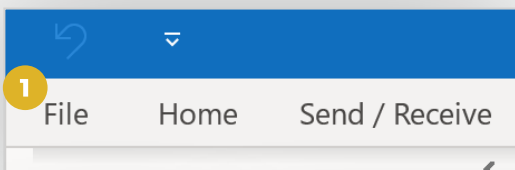




This guide includes everything you need to set up Outlook PC for the Stack Method™.

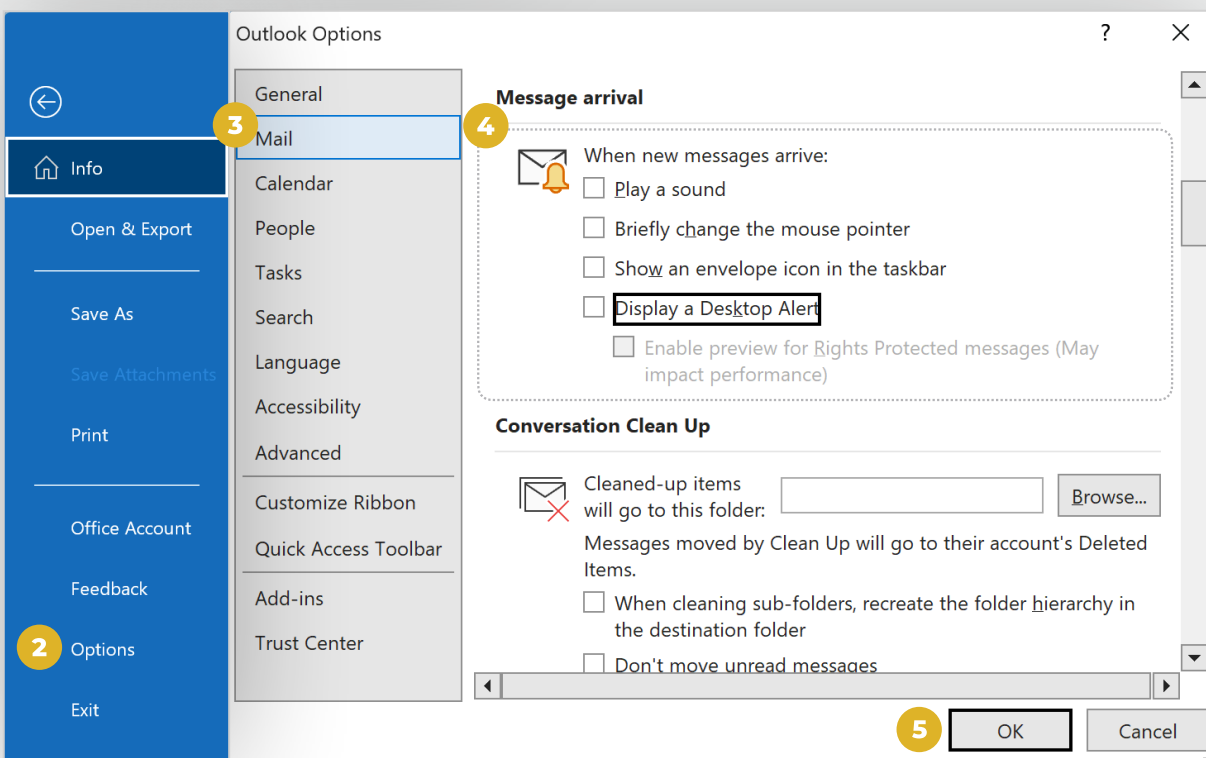
1 SET UP YOUR ENVIRONMENT

Turn off all notifications.



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.



Click *File* on the home ribbon, then select *Options* and then under the *Mail* tab in the options menu uncheck all the Message Arrival options to turn off all notifications. Finally save the changes by clicking OK.

Breathe. You'll be ok.

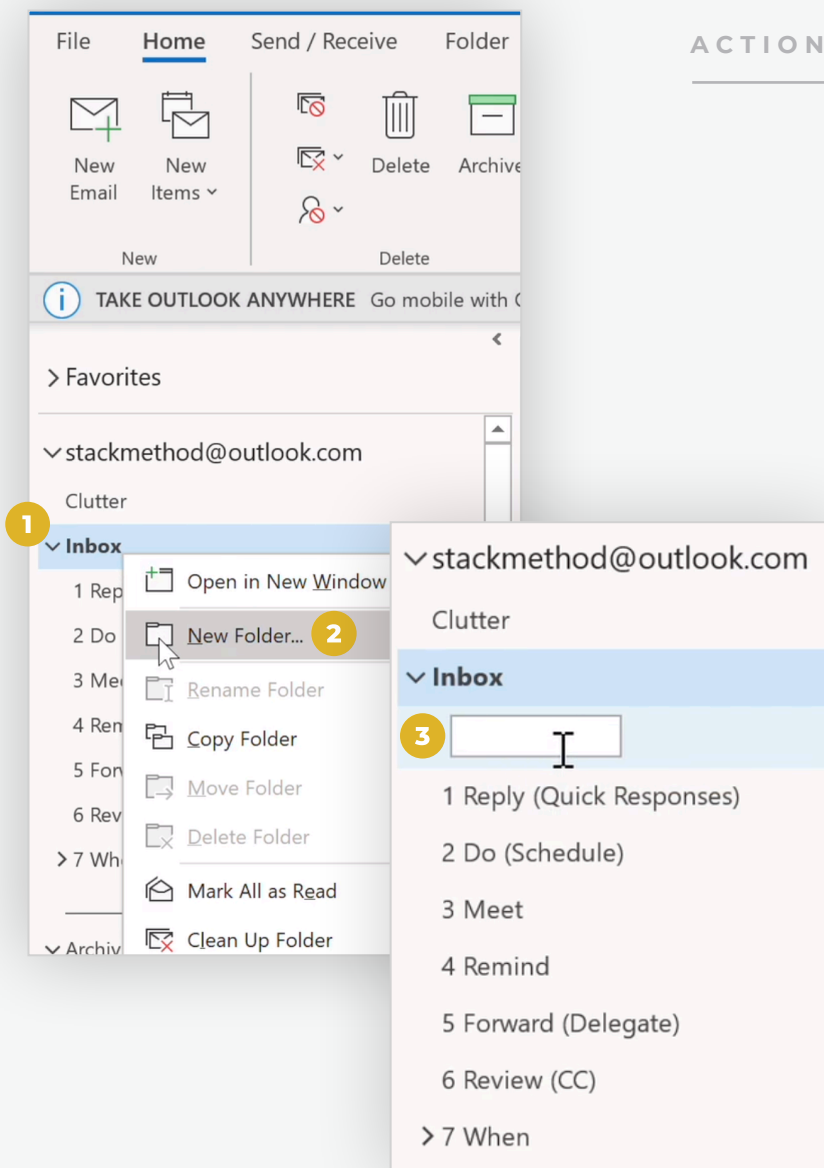


2 CREATE YOUR FOLDERS














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...*, from there you can 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!



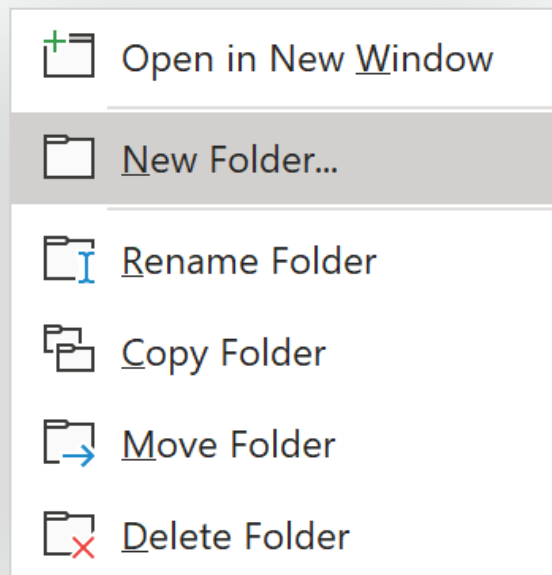
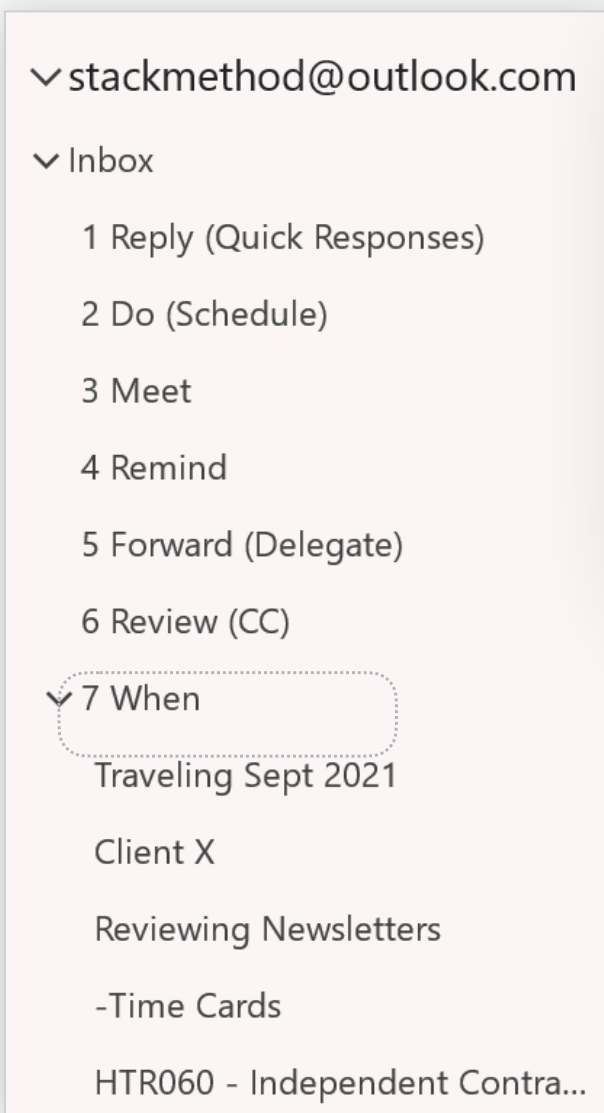
ACTION FOLDER EXAMPLES

-  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 dropdown is expanded.)*



3 SET UP YOUR QUICK STEPS

Set up and customize your quick steps

Quick steps will help you automate common or repetitive tasks by applying multiple actions at the same time to email messages so you can process your inbox faster.

To set them up click on the small arrow under the *Quick Steps* under the home ribbon. You can go to manage Quick Steps and see all the quick steps you currently have or directly customize a new one by selecting *Create New*.

The image shows a sequence of four screenshots illustrating the process of creating a quick step in Outlook:

- Step 1:** The Outlook Home ribbon is shown. A small arrow is highlighted under the 'Quick Steps' section.
- Step 2:** The dropdown menu for Quick Steps is open, showing various actions like 'Schedule', 'Archive', 'Reply', etc. The 'Create New' button is highlighted.
- Step 3:** The 'Manage Quick Steps' dialog box is open. The 'New' button at the bottom is highlighted.
- Step 4:** The 'New Quick Step' dialog box is open. The 'Add Action' button is highlighted, and a list of shortcut keys is shown, with 'CTRL+SHIFT+1' selected.

From there you can select the criteria for the action chosen (*Add as many actions as you'd like*). Then select a shortcut that has not been used for any other quick steps and then click on *Finish*.



4

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. Next to Start and End time, click on "Make Recurring". In the drop pop up menu, set it to recur by selecting *Daily* and "Every weekday (Monday to Friday)."

Title: STACK: Inbox

Start time: Mon 2/13/2023 12:00 PM

End time: Mon 2/13/2023 1:00 PM

Location: [Empty]

Buttons: All day, Time zones, Make Recurring

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.

Appointment Recurrence

Appointment time

Start: 8:30 AM

End: 9:30 AM

Duration: 1 hour

Recurrence pattern

Daily

Weekly

Monthly

Yearly

Every 1 day(s)

Every weekday

Range of recurrence

Start: Mon 2/13/2023

End by: Sun 12/31/2023

End after: 230 occurrences

No end date

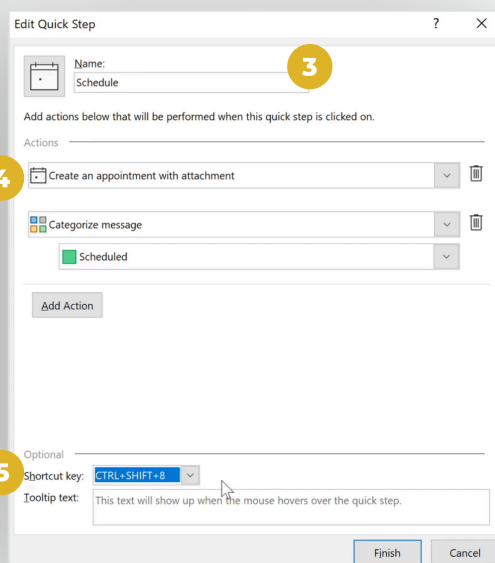
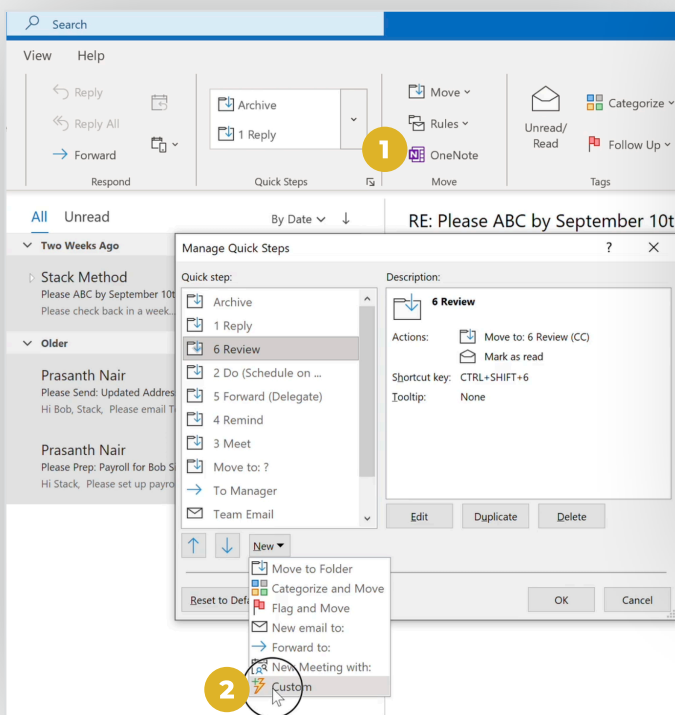
Buttons: OK, Cancel, Remove Recurrence



5 PRACTICE SCHEDULING DO'S

- Schedule your effort emails in your calendar.

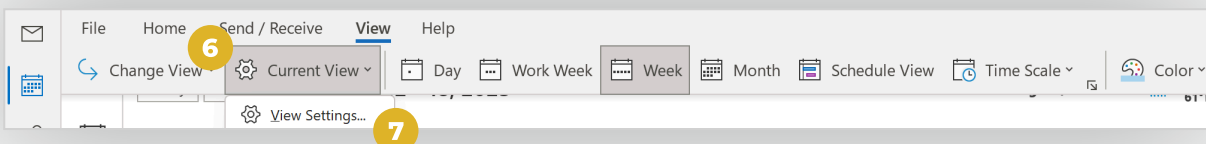
Scheduling “Do’s” (effort emails) will help you process the remainder of your emails much faster, and reduces the feeling of overwhelm by helping you proactively deal with these types of actions.



Start by creating a new Quick step to categorize the emails you will be scheduling in your calendar.

Open the “Manage Quick Steps” pop up by clicking on the small arrow under the Quick Steps in the home ribbon. Create a new quick step by selecting *New* and *Custom*. From there name the new quick step *Schedule* and choose an action by selecting *Create an appointment with attachment* under the *Choose an Action* dropdown. Then select *Add Action* and click on *Categorize message* and choose *Scheduled* as the category and choose the CTRL + SHIFT + 8 as the shortcut key.

From there change to calendar view, select *View* in the home, ribbon and then click on *Current View > View Settings* to add the conditional formatting, this will link the messages to the calendar and will ensure is color coded.





Add conditional formatting

Select the *Conditional Formatting*, then select *Add* to create a new condition. Name the condition “DO:” and color code it the color you prefer - we use green. Then add the actual condition by clicking on the *Condition...* button.

Set the condition to “Search for the word(s):” and then type “DO:” and set it to do so *In: subject field only*.

Then save all these changes by clicking on *OK*.



6 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.

By Date ▾ ↓

Filter

- ✓ All Mail
- Unread Mail
- Flagged Mail
- Mentioned Mail

Arrange by

- ✓ Date (Conversations)
- From
- To
- Categories
- Flag Status
- Flag: Start Date
- Flag: Due Date
- Size
- Subject
- Type
- Attachments
- Account
- Importance

Sort

- ✓ Oldest on Top
- Newest on Top
- Show Focused Inbox

File Home Send / Receive View Help

New Email ▾ | Delete ▾ | | ▾

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.

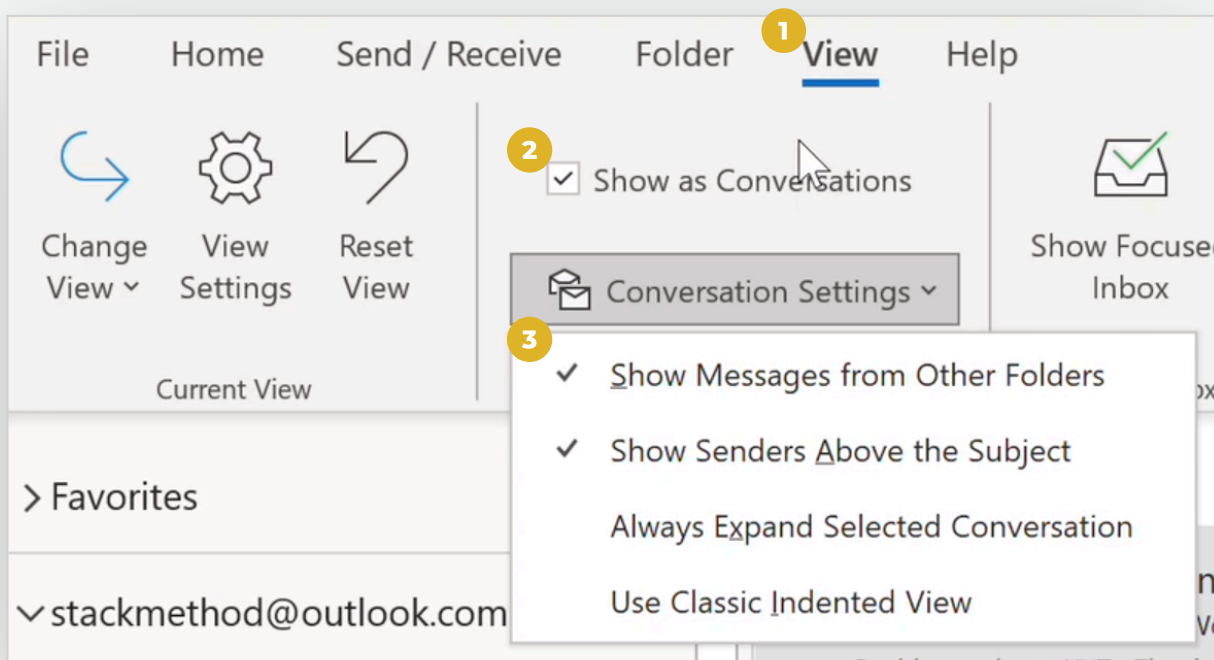


7 EMAILS WITH THREADS

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.

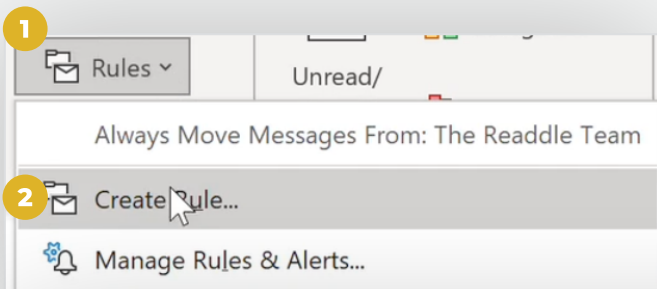


8 PRACTICE SETTING UP RULES

- 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.

