ELEVATE OUTLOOK EFFICIENCIES

EMAIL MANAGEMENT

Access and Ownership

Inbox Clean Up

Team Redirects

Shared Folders and Custom Rules

Sales Team	Claims
Customer Care	Fire Underwriting
2nd/3rd Request	Internet Leads
State to State	Life-Health Med Exams
Auto Underwriting	SFPP
CI Assignment G4521	Flood

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ELEVATE
OFFICE EFFICIENCIES

CALENDAR MANAGEMENT

Shared Calendar

Scheduling Appointments

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HOW TO...

How to Create a Custom Rule

(Note: Your AFS can assist you with this process.)

Ex: A Quote Wizard lead arrives in Agent Inbox but should be moved to the leads folder and shared with sales team members

- Open Mail > choose the three dots at the far right on the headings bar > Rules > Create Rule > Advanced Options (bottom right)
- From the Rules Wizard, find the condition that will identify the message to be handled by the rule (i.e., “when a message arrives from [emailaddress@email.com]).
- Select the condition by clicking its checkbox > Next
- Choose what action(s) to perform. (Note: multiple actions can be chosen, so it is recommended to also choose “delete it” in addition to other action(s) to remove it from the Agent inbox. (i.e., check boxes “forward it to people or public group”, “move to [Sales] folder”, and “delete it”.) > “Next”.
- If there are any exceptions to the rule select them here, though for simplicity’s sake exceptions will not be used in most cases > Next
- Name the rule (i.e., “New Lead - Quote Wizard”)
- Check “Turn on this rule” > Finish

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HOW TO...

Use Agent Calendar as Shared Office Calendar

Give permissions to each team member to utilize the Agent's Outlook calendar (Agent):

- Open Mail and choose the Calendar view (by selecting the calendar icon on the left navigation window).
- Right click on your personal calendar.
- Select Sharing Permissions > select My Organization > Select "Can Edit" (in the middle of the page under permissions)

Give delegate access

- Open Mail and choose File (on the Headings bar).
- Select Account Settings (on the Account Information page) > Delegate Access from the drop down that appears > Add > Type the name of the person that will have delegate access in the Search field > Enter
- Select the Name that to be chosen in the Results > Add (in the bottom row of the dialog box) > OK
- Another dialog box will open. In this box, ensure that "Editor (can read, create, and modify items)" is selected beside the calendar and tasks > OK
- Click OK in the initial dialog box remaining open

Create assigned calendar colors

- OpenOutlookCalendar>Create"NewAppointment">Categorize>All Categories > New > use default or select color > enter Team Member Name > OK > OK
- Note: to remove team members Open Outlook Calendar > Create "New Appointment" > Categorize > All Categories > check Team Member name from list > Delete > Yes > OK