Role of Technology in Improving Productivity at Work *Email Management*

By: Uday Shah

Email Management

<u>MS Outlook</u> Gmail by Google

5/17/2016

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Email Management - Outlook



- Outlook is Desktop based tool for Email Management
- Emails are downloaded in *INBOX* and available for further usage
- Multiple *Email accounts* can be configured into single instance of Outlook
- Multiple data (PST) files can be configured
- Email account can be mapped to data file
- Data files are restricted only by Storage capacity
- Calendar, Contacts, Task and Notes functions are in-built

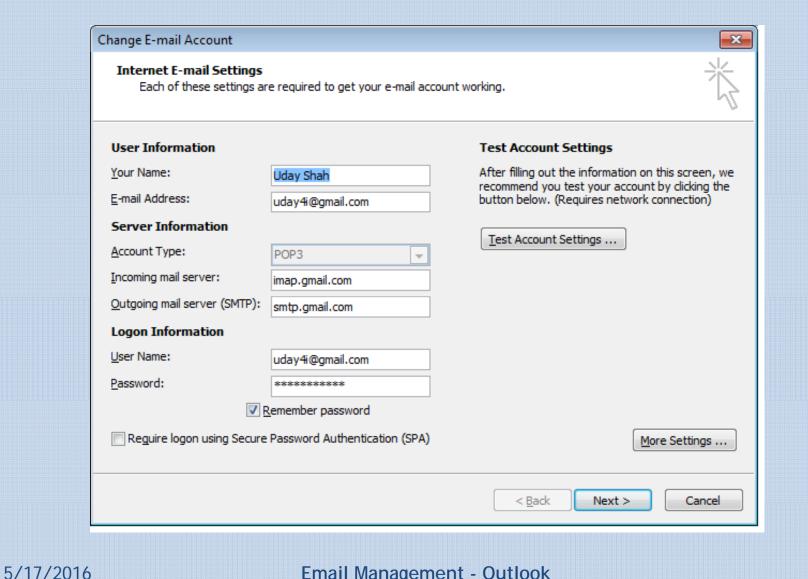
Inbox

Inbox - Microsoft Outlook File Edit View Go Tools	Actions Help	Type a question	_ = >
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Personal Folders Admin	CCC - ICAI Invitation for empanelment as Resource Persons for the Career Counselling progr	Sun 14-06-2015 5:35 PM	Ÿ
🚞 AMC 词 AVG Virus Vault	a noreply@vod The all new My Vodafone App!	Sun 14-06-2015 3:19 PM	P
AWC - Power failure (2)	ICICI Bank Instant Personal Loans @ 13%. Apply Now !	Sun 14-06-2015 1:53 PM	Ŷ
Bank-uk (174) Barcode	Gautam Agrawal WORKSHOP ON ADVANCE BUSINESS WRITING	Sun 14-06-2015 1:49 PM	Ÿ
🚞 Bhagwan	SBI Cards Introducing New SimplySAVE SBI Card. Enjoy More Save More - #14JuneOffer	Sun 14-06-2015 1:27 PM	P
BKUK	American Express Invitation to an American Express® Card Membership	Sun 14-06-2015 1:26 PM	P
Mail	credit_cards@icici Transaction alert for your ICICI Bank credit card	Sun 14-06-2015 1:01 PM	7
	Bajaj Finance Buy any furniture with a down payment of just Rs.8888 and get exciting offers	Sun 14-06-2015 12:20 PM	7
Calendar	🖂 Naresh Dhoot 🛛 [Khimji Kunverji & Co. Alumni] Attending seminar at Raheja classique club	Sun 14-06-2015 11:49 AM	8
Contacts	Facebook Bharat D Bhanushali-bb added a new photo	Sun 14-06-2015 10:46 AM	Ÿ
Tasks	alerts@hdfcbank Alert Message From Hdfc Bank	Sun 14-06-2015 10:41 AM	Ÿ
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Email accounts and data file

Account Se	ettings	
	I Accounts u can add or remove an account. You can sele	t an account and change its settings.
	Data Files RSS Feeds SharePoint Lists Int	ernet Calendars Published Calendars Address Books
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/2016	Email Man	agement - Outlook

Gmail account



Email Management - Outlook

Organise

- Organise using *Colours*,
 - Colour code on basis of "From Sender"
 - Colour code on basis of "To Receipient"
- Organise in Folders and sub-folders
- Flag for Follow-up
- Search and Advance Search

Organise using Colours

Ways to Organ	ize Inbox	Automatic Formatting 🗙 🖌
Using Folders Using Colors Using Views	 Color messages sent to vuday@krutisystems.com in Blue Show messages sent only to me in Navy v Turn on To view or edit your coloring, and for more advanced options, click on " 	Apply Color Done! Automatic Formatting" above. Automatic Formatting
🔄 Inbox		Rules for this view: ✓ Unread messages ✓ Unread group headers
·쯔 D Ø From	Subject	✓ Onread group headers ✓ Submitted but not sent ✓ Expired e-mail ✓ Overdue e-mail
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🖂 ICICI Ba	ank Instant Personal Loans @ 13%. Apply Now !	
🖂 Gautam /	Agrawal WORKSHOP ON ADVANCE BUSINESS WRITING	<u>C</u> ondition
SBI Cards	s Introducing New SimplySAVE SBI Card. Enjoy More Save Mo	OK Cancel

Organise using Folders

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HR (59) IBIS (1)	🙈 🛛 Bhagwan Jag 🛛 uda	ay@kservices.in	FW: Documents for Account opening - Private Ltd.	Mon 08-12-2014 12:2	27 🌾
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Mail	🖻 🛛 JatinV.Shah@ uda	ay@krutisystems	General forms	Thu 04-12-2014 9:47	
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Calendar	🖻 🛛 Uday Shah (K 'Swa	/apnil.Upadhyay	Debit authority letter Kruti Software Consultancy Pvt.	. Sat 01-11-2014 12:27	
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🖂 🛛 <mark>Gautam</mark> Agrawal	WORKSHOP ON ADVANCE BUSINESS WRITING	Sun 14-06-2015 1:49 PM	Ŷ
🖂 🔋 CA Vijay Goel	RE: URGENT - IFA India Branch Accounts FY 2013-14	Sat 06-06-2015 1:42 PM	Ŷ
Gaurav Kapoor	[SPAM] Seminar on How To Provide Exceptional Customer Service	Sat 06-06-2015 3:35 AM	Ÿ
🖻 🛛 Craig Adams	Re: Kruti Systems	Mon 18-05-2015 2:28 AM	Ŷ
🖻 🛛 Mahesh Gadh	IFA : Payable to IFA NL - MEMBERSHIP 2015	Fri 15-05-2015 1:18 PM	Ÿ
🖂 🖉 Mahesh Gadhavi	IFA : SERVICE TAX WORKING FOR JANUARY 15 to APRIL 15	Fri 15-05-2015 1:10 PM	Ÿ
Facebook	Jatin Lodaya updated his status: "One of the best time lapses on	Wed 13-05-2015 9:47 PM	Ÿ
🖂 🛯 IFA INDIA	Updated list of membership fees received for 2015 at IFA WRC Office [GroupMail]	Tue 12-05-2015 1:19 PM	Ÿ
🖂 🔘 IFA INDIA	Updated list of membership fees received for 2015 at IFA WRC Office	Tue 12-05-2015 1:18 PM	Ÿ
🖂 🕕 IFA INDIA	Update on - Membership fees received - at IFA WRC Mumbai office - 02.05.15	Sat 02-05-2015 3:40 PM	Ÿ
🖂 🕕 IFA INDIA	Update on - Membership fees received - at IFA WRC Mumbai office - 02.05.15	Sat 02-05-2015 3:39 PM	Ÿ
🖻 🛛 Sushil Lakhani	FW: Outstanding Membership Fees Report for 2014 and 2013 on	Tue 21-04-2015 3:38 PM	Ÿ
🖻 🛛 Sushil Lakhani	FW: Outstanding Membership Fees Report for 2014 and 2013 on	Mon 20-04-2015 1:26 PM	Ÿ
🖂 🔋 Uday Shah	Outstanding Membership Fees Report for 2014 and 2013 on 18-04-2015	Sat 18-04-2015 5:42 AM	Ÿ
🖂 🖉 Uday Shah	Outstanding Membership Fees Report for 2014 and 2013 on 18-04-2015	Sat 18-04-2015 5:23 AM	Ÿ
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Advance Search

🛸 - Messages: Containing Fees - Advanced Find 🛛 🖙 💶 🛪	🛬 - Messages: Containing Fees - Advanced Find 🛛 😂 💶 🗖
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Look for: Messages In: Inbox;Education;ICAI Browse Messages More Choices Advanced Find Now Seargh for the word(s): Fees Image: Fees Image: Stop Stop In: frequently-used text fields Image: Stop New Search From Sent To Sent To Image: None Image: None Image: None Time: none Image: None Image: None Image: None Image: None	Look for: Messages In: Inbox;Education;ICAI Brov Messages More Choices Advanced Find Find items that match these criteria: S S Received last month S From contains @hdfcbank.com New; Define more criteria:
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Image: Second state Image: Second state Ima	Citi Shop for Your ♥ Ones & Get 2 Sun 1 5 Inbox
285 Items	CF Certificate Course on Derivatives Sat 1 1 Inbox 285 Items
203 Items	205 Items

- Outlook offers Rules and Alerts to Organise data, events, tasks
- Alerts Email from a particular id
- Rules offer wide spectrum option to Manage
 - Rule to file Email to pre-defined Folder
 - Rule to auto-forward
 - Rule to Schedule/ flag for follow-up

Rules Wizard	Rules Wizard
Start from a template or from a blank rule Step 1: <u>S</u> elect a template	Finish rule setup.
Stay Organized Image: Move messages from someone to a folder Image: Move messages with specific words in the subject to a folder Image: Move messages sent to a distribution list to a folder Image: Move messages sent to a distribution list to a folder Image: Move messages sent to a distribution list to a folder Image: Move messages sent to a distribution list to a folder Image: Move messages from someone for follow-up Image: Move Microsoft Office InfoPath forms of a specific type to a folder Image: Move RSS items from a specific RSS Feed to a folder Image: Move RSS items from a specific RSS Feed to a folder Image: Move RSS items from someone in the New Item Alert Window Image: Play a sound when I get messages from someone Image: Send an alert to my mobile device when I get messages from someone Image: Start from a blank rule	Step 1: Specify a name for this rule Parimal M Parikh (parimal@parimalparikh.com) - Alert Step 2: Setup rule options Run this rule now on messages already in "Inbox" Image: Image
Check messages when they arrive	Step 3: Review rule description (click an underlined value to edit) Apply this rule after the message arrives from Parimal M Parikh (parimal@parimalparikh.com)
Step 2: Edit the rule description (dick an underlined value) Apply this rule after the message arrives from Parimal M Parikh (parimal@parimalparikh.com) display PMP in the New Item Alert window Example: Display mail from my friend in the New Item Alert Window	display PMP in the New Item Alert window
Cancel < Back Next > Finish	Cancel < Back Next > Finish

Rules Wizard	Rules Wizard
Start from a template or from a blank rule Step 1: <u>S</u> elect a template	Finish rule setup.
Stay Organized Image: Move messages from someone to a folder Image: Move messages with specific words in the subject to a folder Image: Move messages sent to a distribution list to a folder Image: Move messages sent to a distribution list to a folder Image: Move messages from someone for follow-up Image: Flag messages from someone for follow-up Image: Move Microsoft Office InfoPath forms of a specific type to a folder Image: Move RSS items from a specific RSS Feed to a folder Image: Move RSS items from a specific RSS Feed to a folder Image: Move RSS items from a specific RSS Feed to a folder Image: Move RSS items from a specific RSS Feed to a folder Image: Move RSS items from someone in the New Item Alert Window Image: Play a sound when I get messages from someone Image: Send an alert to my mobile device when I get messages from someone Image: Start from a blank rule Image: Check messages when they arrive Image: Check messages after sending Step 2: Edit the rule description (click an underlined value)	Step 1: Specify a name for this rule Paresh Shanghavi (pareshilpa@yahoo.com) Step 2: Setup rule options Run this rule now on messages already in "Inbox" Image: Imag
Apply this rule after the message arrives Cancel < Back	Cancel < Back

5/17/2016

Rules Wizard	Rules Wizard
Start from a template or from a blank rule Step 1: <u>S</u> elect a template	Finish rule setup.
Stay Organized Image: Move messages from someone to a folder Image: Move messages with specific words in the subject to a folder Image: Move messages sent to a distribution list to a folder Image: Move messages sent to a distribution list to a folder Image: Move messages from someone for follow-up Image: Flag messages from someone for follow-up Image: Move Microsoft Office InfoPath forms of a specific type to a folder Image: Move RSS items from a specific RSS Feed to a folder Image: Move RSS items from someone in the New Item Alert Window Image: Move Play a sound when I get messages from someone Image: Send an alert to my mobile device when I get messages from someone	Step 1: Specify a name for this rule Uday Shah (Kruti Services) - Out Step 2: Setup rule options Run this rule now on messages already in "Inbox" Iurn on this rule Create this rule on all accounts
Start from a blank rule Check messages when they arrive Check messages after sending Step 2: Edit the rule description (dick an underlined value) Apply this rule after I send the message	Step 3: Review rule description (click an underlined value to edit) Apply this rule after I send the message through the Uday Shah (Kruti Services) account and on this machine only move a copy to the KServices folder
Cancel < Back Next > Finish	Cancel < <u>B</u> ack <u>N</u> ext > Finish

Rules and Alerts	? <mark>×</mark>
E-mail Rules Manage Alerts	
🖄 New Rule Change Rule 🗸 🖹 Copy 🗙 Delete 🛛 🕈 👎 Run Rules Now Options	
Rule (applied in the order shown) Actions	•
StanChart Statement	*
Statement Online - CITIBANK PLATINUM MASTERCARD	*
✓ TOI Online Editor. (For other machine)	
Dayanand Patere @Intercon (For other machine)	
🗹 Lalman Yadav @Intercon (For other machine)	
✓ Parag Gadewar - Intercon (For other machine)	
✓ Support - Kruti Systems (support@krutisystems.com) (For other	-
Rule description (click an underlined value to edit):	
Apply this rule after the message arrives	
from Parag Gadewar@Intercon	
and on this machine only	
move it to the <u>Parag Pending</u> folder	
Enable rules on all RSS Feeds	
	Apply
OK Cancel	Apply

Rules and Alerts	? ×
E-mail Rules Manage Alerts	
🖄 New Rule Change Rule 🗸 🖹 Copy 🗙 Delete 🛛 🎓 👎 Run Rules Now Options	
Rule (applied in the order shown) Actions	*
✓ Private Equity & Venture Capital India Group Members	
 Private Equity & Venture Capital India Group Members International Referral Group Members Finance & Accounting Shared Services / Outsourcing Group Memb Value Research Esigner Amit Jasani Fin. Services Pvt. Ltd Margin 	
✓ Finance & Accounting Shared Services / Outsourcing Group Memb	
Value Research	
🗹 Esigner Amit Jasani Fin. Services Pvt. Ltd Margin 📄	
Esigner Amit Jasani Fin. Services Pvt. Ltd.	<u> </u>
✓ Parag Gadewar 1	~
Rule description (dick an underlined value to edit):	
Apply this rule after the message arrives	
from Esigner Amit Jasani Fin. Services Pvt. Ltd.	
and with <u>NSECM CONTRACT SD05</u> in the subject	
forward it to <u>Bhagwan K Jagwani (bhagwan@kservices.in)</u> and move it to the <u>AJFSL-Bill</u> folder	
Enable rules on all RSS Feeds	
OK Cancel	Apply

Archive

HDFC Bank	k - Microsoft Outlook		⇔ - = x
<u>File</u>	<u>V</u> iew <u>G</u> o <u>T</u> ools <u>A</u> ctions <u>H</u> elp	T	ype a question for help 👻
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2 All Mail	AutoArchive	✓ Archive or delete old items	15 5:41 PM 95 🏹
🛄 G		Show archive folder in folder list	15 5:40 PM 95 🕅
🗆 🚞 H	Manages mailbox size by deleting old items or moving them to an archive file and by deleting expired items.	Default folder settings for archiving	15 5:40 PM 83 🕅
	Au <u>t</u> oArchive	Clean out items older than 6 🚔 Months 🔻	15 3:37 PM 25 🕅
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	Reading Pane	Permanently delete old items	014 12:2 27 🌾
ы 🗾 К		Apply these settings to all folders now	014 12:1 24 🕅
A Mail	То-Do <u>B</u> ar	To specify different archive settings for any folder, right-click	014 9:47 80 🕅
	Person Names	on the folder and choose Properties, then go to the AutoArchive tab.	014 9:45 22 🕅
Calend	🕵 🔲 Display online status next to a person name	Retention policy	14 12:27 49 🏹
Secontac	Display online status in the To and Cc fields only when mouse pointer rests on a person name	The network administrator has not set retention policies.	014 7:32 PM 50 🕅
_	pointer rests on a person name		014 7:30 PM 49 🕅
Tasks		Retention Policy Information	014 7:37 PM 71 🕅
		OK Cancel	014 7:35 PM 70 🕅
			114 6:54 PM 60
461 Items	OK Cancel Apply	Send/Receive Error -	click here 😗 🔹 📰

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Email Management - Outlook

Archive - Folder

HDFC Bank Properties
General Home Page AutoArchive Administration Forms
Do not archive items in this folder
Archive items in this folder using the <u>d</u> efault settings
Default Archive <u>S</u> ettings
Archive this folder using these settings:
Clean out items older than 3 👘 Months 🔻
Move old items to default archive <u>f</u> older
Move old items to: C:\Arch\HDFCArc2015.pst Browse
© Permanently delete old items
Retention policy
The network administrator has not set retention policies.
Retention Policy Information
OK Cancel Apply

Email Management - Gmail

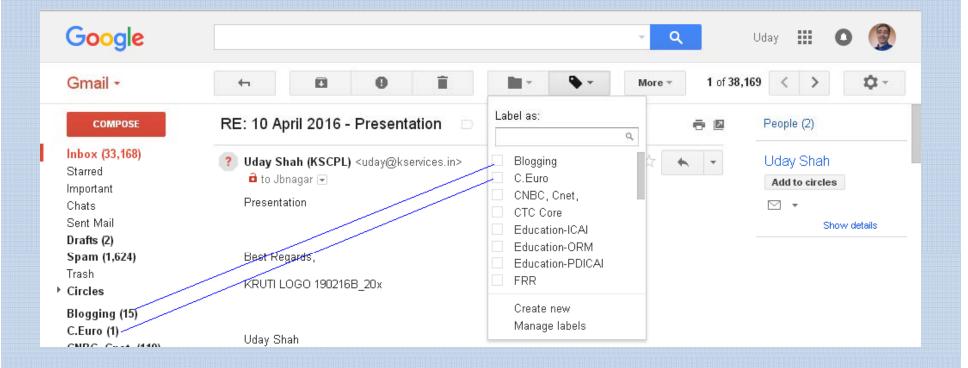
- Gmail is Web based tool for Email Management (limited Offline functions are available)
- Multiple *Email accounts* can be configured into single instance of Outlook
- 15GB space is allocated free of cost
- Contacts and Tasks are in-built

		Ir	nbox
M Inbox (33,188) - uday4i@gm 🗙		Uday	
	il.google.com/mail/u/0/#inbox uti 🗀 MyPersonal 🗀 KServices 🦳 INTERNET		া কি 🛞 🗧
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Inbox (33,188) Starred Important	□ ☆ □ Uday Shah (KSCPL) □ ☆ □ Uday Shah @ Kruti Servic.	RE: 10 April 2016 - Presentation - Presentation Best Regards, KRL () (no subject) - Please do not delete this link without watching. It is wo	9:46 pm 9:42 pm
Chats Sent Mail Drafts (2) Spam (1,625) Trash	□ ☆ □ Uday Shah (KSCPL) □ ☆ □ Uday Shah (Kruti) (2)	10 April 2016 - Background Material - Background Material Best F C FW: Dayanand, Buyers Demanding for Cotton Kurti, Full Sleeve Ladi	7:41 pm 7:39 pm
	□ ☆ □ Piyush, Uday (3) □ ☆ □ ILESH SHAH	Verified Lead at 4 PM 09-04-2016 - Hi, We have generated the follo CSV FILE - THANKS & REGARDS ILESH D. SHAH cell - 982063272	7:38 pm 6:16 pm
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Organise

- Emails can be organised using Label
- Each Label can be viewed as Folder
- Filters can be created to automat Labeling Email as received
- Flag for Follow-up
- Search and Advance Search

Organise using Label



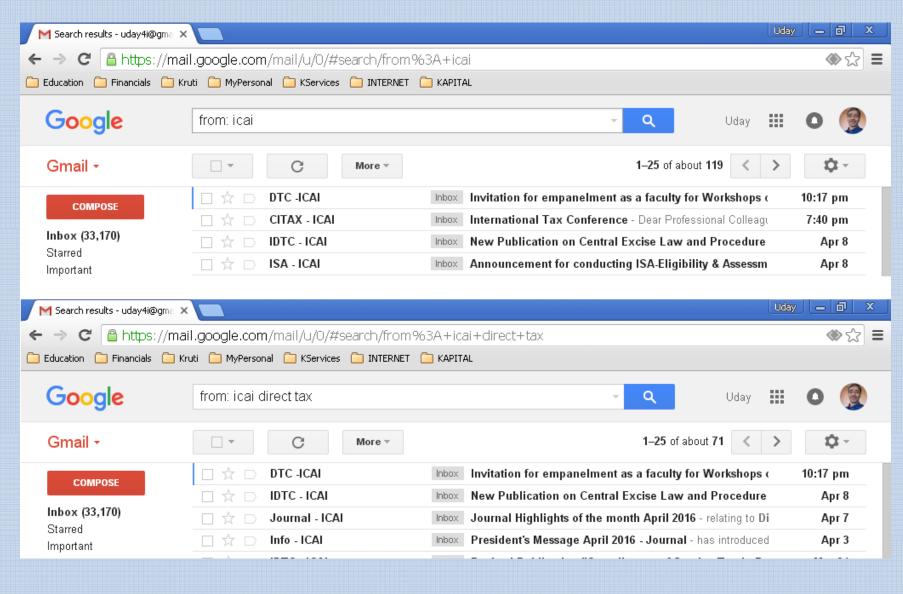
Organise using Label

Google	label:blogging	- Q Uday 🎹	0 இ
Gmail -	□ [¬] C More [¬]	1–18 of 18 < >	\$
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COMPOSE	🗌 🕁 🕞 SiteBlog	Inbox PARAG@KRUTI we can build your blog for you Hi P4	Mar 28
Inbox (33,168)	🗌 🕁 📄 Zac Johnson	Inbox Video 6: How to rank at the top of Google! - Billions of se	Mar 27
Starred Important	🗌 📩 🕞 Zac Johnson	Inbox Video 5: Bring your blog to live with these free wordpre	Mar 26
Chats	🗌 📩 🕞 SiteBlog	Inbox Create your 100% free website - Hi PARAG@KRUTI Are y	Mar 26
Sent Mail	📄 📩 🕞 Zac Johnson	Inbox Video 4: How to make your blog stand out from the crov	Mar 25
Drafts (2)	🖂 🗁 Zac Johnson	Inbox Questions? How can I help you? - Hello, I wanted to reach	Mar 24
Spam (1,624) Trash	□ ☆ □ SiteBlog	Inbox Let us build your blog for you Hi PARAG@KRUTI How	Mar 24
▶ Circles	□ ☆ □ SiteBlog	Inbox Good news We've gone free - Hi PARAG@KRUTI I have so	Mar 24
Blogging (15)	🗆 🛧 🕞 Zac Johnson	Inbox Video 3: How to setup your blog in 5 minutes - Hello again, I	Mar 23

Organise using Filter

C https://mail.google.com/mail/u/0/#create-filter/from =parag%40krutisystems.com&sizeoperator =s_sl&sizeunit=s_sn & Education Financial Kruti MyPersonal KServices INTERNET KAPITAL from:(parag@krutisystems.com) Filter From barag@krutisystems.com Subject Barag@krutisystems.com To Decont have Decont have Has the words Decont have MB \$ Create filter with as important Create filter with as important Create filter with as important Create filter with as apply filter to matching conversations.	M Search results - uday4i@gma ×	Uday 👝 🗗 🗙
from:(parag@krutisystems.com) from:(parag@krutisystems.com) Filter * From * barag@krutisystems.com Skip the lnbox (Archive it) To Skip the lnbox (Archive it) Subject Mark as read Has the words Delete it Decont have Always mark it as important Has attachment Dont include chats	← → C 🔒 https://mail.google.com/mail/u/0/#create-filter/from=par	rag%40krutisystems.com&sizeoperator=s_sl&sizeunit=s_sn 🕸 😭 🔳
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Filter From parag@krutisystems.com To Subject Has the words Docon't have Has attachment Don't include chats	from:(parag@krutisystems.com)	from:(parag@krutisystems.com)
Create filter with this search » Create filter with this search with this	Filter From parag@krutisystems.com To Subject Has the words Docon't have Has attachment Don't include chats Size greater than \$ MB \$	 When a message arrives that matches this search: Skip the Inbox (Archive it) Mark as read Star it Apply the label: support \$ Forward it add forwarding address Delete it Never send it to Spam Always mark it as important Never mark it as important Categorize as: Choose category \$ Create filter Also apply filter to matching conversations.

Search



Email Management - Gmail

5/17/2016

Advance Search

from: icai direct tax	from: icai direct tax		
Search All Mail 🗢	Search Read Mail \$		
From	From		
icai*	icai*		
То	То		
Subject	Subject		
Has the words	Has the words		
direct taxes	direct taxes		
Doesn't have	Doesn't have		
Has attachment	Has attachment		
Don't include chats	Don't include chats		
Size greater than 🗢 MB 🌩	Size greater than 💠 MB 💠		
Date within 1 month 🗢 of	Date within 1 month 🗢 of		
Create filter with this search »	Create filter with this search »		

Advance Search

Google				- α	Uday 🚻	0 இ
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EMAIL Management

Thank you, Uday Shah