

# Outlook Quick Set Up Guide

## Set up Auto-Reply Message:

1. Select File > Automatic Replies.  
Note: If you don't see the Automatic Replies button, follow the steps to [use rules to send an out of office message](#).
2. Select Send automatic replies.
3. If you don't want the messages to go out right away, select Only send during this time range.
4. Choose the dates and times you'd like to set your automatic reply for.
5. Type in a message. You can format the text using the tool bar, or cut and paste text you've formatted, including hyperlinked text.
6. Select OK.

## Create an Email Signature:

1. Select New Email.
2. Select Signature > Signatures.
3. Select New, type a name for the signature, and select OK.
4. Under Edit signature, type your signature and format it the way you like.
5. Select OK and close the email.
6. Select New Email to see the signature you created.

## Send & Receive Attachments:

1. Select **Home** > **New Email**.  
Or, for an existing email, select **Reply/Reply All** or **Forward**.
2. Select **Home** > **Attach File**,  and choose an option:
  - **Recent items** - select the arrow to find a file or image you have saved or worked with recently. These files could be saved locally, or they might exist on internal network locations.
  - **Attach Item > Outlook Item** - attach an email message.
  - **Attach Item > Business Card** - attach an electronic business card to the message.
  - **Attach Item > Calendar** - insert a calendar, with specific date range and other details.
  - **Browse Web Locations** - select files from OneDrive, SharePoint sites, or Group Files that you have accessed earlier.
  - **Browse This PC** - select a file from your local computer.

## Add a Contact:

Add a contact from an email in Classic Outlook for Windows

1. Right-click a name on the **To, Cc, Bcc, or From** line.
2. Select **Add to Outlook Contacts**.
3. Add any additional details you want.
4. Select **Save & Close**.

Add a contact from scratch in Classic Outlook for Windows

1. Select **People**  > **New Contact**.
2. Add any additional details you want.
3. Select **Save & Close**.

## Create a Contact Group

1. On the Navigation bar, choose **People** .
2. Select **Home** > **New Contact Group**.
3. In the **Contact Group** box, type the name for the group.
4. Select **Contact Group** > **Add Members** , and then select an option:
  - Select **From Outlook Contacts**.
  - Select **From Address Book**.
  - Select **New E-mail Contact**.
5. Add people from your address book or contacts list, and choose **OK**. To select multiple people, hold down the **Ctrl** key as you choose members.
6. Choose **Save & Close**.

## Assign a Category

1. To assign a category to an email, right-click the message, choose **Categorize**, then pick a category.
2. The first time you use a category, Outlook asks if you want to rename it. Otherwise it's named for a color. You can create a category by selecting **New** > **Name** > **Color** > **OK**.
3. To see all categories, select **Categorize** > **All Categories**.

## Set Up a Delegate (Proxy)

1. Select the **File** tab, then select **Account Settings** > **Delegate Access**.
2. In the dialog, select **Add**.
3. Type the name of the person whom you want to designate as your delegate, or search for and then click the name in the search results list.
4. Select **Add**, then select **OK**.
5. In the **Delegate Permissions** dialog box, accept the default permission settings or select custom access levels for Exchange folders.

**Note:** By default, the delegate is granted **Editor (can read, create, and modify items)** permission to your **Calendar** folder. When the delegate responds to a meeting on your behalf, it is automatically added to your **Calendar** folder.

6. To send a message to notify the delegate of the changed permissions, select the **Automatically send a message to delegate summarizing these permissions** check box.
7. If you want, select **the Delegate can see my private items** check box.

Important: This setting affects all Exchange folders. This includes all Mail, Contacts, Calendar, Tasks, Notes, and Journal folders. There is no way to grant access to private items in only specified folders.
8. Click **OK**.

## Organize Email Using Folders:

### Create a folder

1. Right-click your name in the **Folder Pane** and select **New Folder**.  
Or right-click **Inbox** to add a folder inside the Inbox and select **New Folder**.
2. Type a name for the folder and press Enter.
3. Select the new folder to open it.

### Move messages into a folder

1. Select an email message.
2. Drag and drop it into a folder.

## Set Up Rules:

### Create a rule on a message

1. Right-click an existing message and select **Rules > Create Rule**.
2. Select a condition, and what to do with the message based on the condition.  
For example, to move messages with a certain title to a specific folder, select the **Subject contains** condition, select **Move the item to folder**, select or create a **New folder**, and then select **OK**.
3. When you're done creating the rule, select **OK**.
4. To use the rule right away, select the **Run this new rule now on messages already in the current folder** checkbox, and then select **OK**.

The message now appears in that folder.

### Create a rule from a template

1. Select **File > Manage Rules & Alerts > New Rule**.
2. Select a template.

For example, to flag a message:

- Select **Flag messages from someone for follow-up**.

3. Edit the rule description.
  - Select an underlined value, choose the options you want, and then select **OK**.
4. Select **Next**.
5. Select the conditions, add the relevant information, and then select **OK**.
6. Select **Next**.
7. Finish the rule setup.
  - Name the rule, setup rule options, and review the rule description. Click an underlined value to edit.
8. Select **Finish**. *Certain rules will only run when Outlook is on. If you get this warning, select **OK**.*
9. Select **OK**.

## Resources and Guides

- [Office Accessibility Center](#)
- [Office Quick Start Guides](#)

## Outlook Help

- [Outlook.com Welcome Site](#)
- [Outlook Web App Keyboard Shortcuts](#)
- [Create a signature on Outlook for web](#)

## Sharing Calendars

- [Sharing your calendar on Outlook for Android or iOS](#)
- [Sharing your calendar on Outlook for PC](#)
- [Sharing your calendar on Outlook for web](#)

## Mobile Help

- [Configure mail for iOS](#)
- [Configure mail for Android](#)
- [Android Office 365 for Outlook Setup](#)
- [Apple/iOS Office 365 or Outlook Setup](#)