

Microsoft Outlook for Attorneys

Florida Bar CLE



Jordan Turk

Attorney & Director of Education, Smokeball





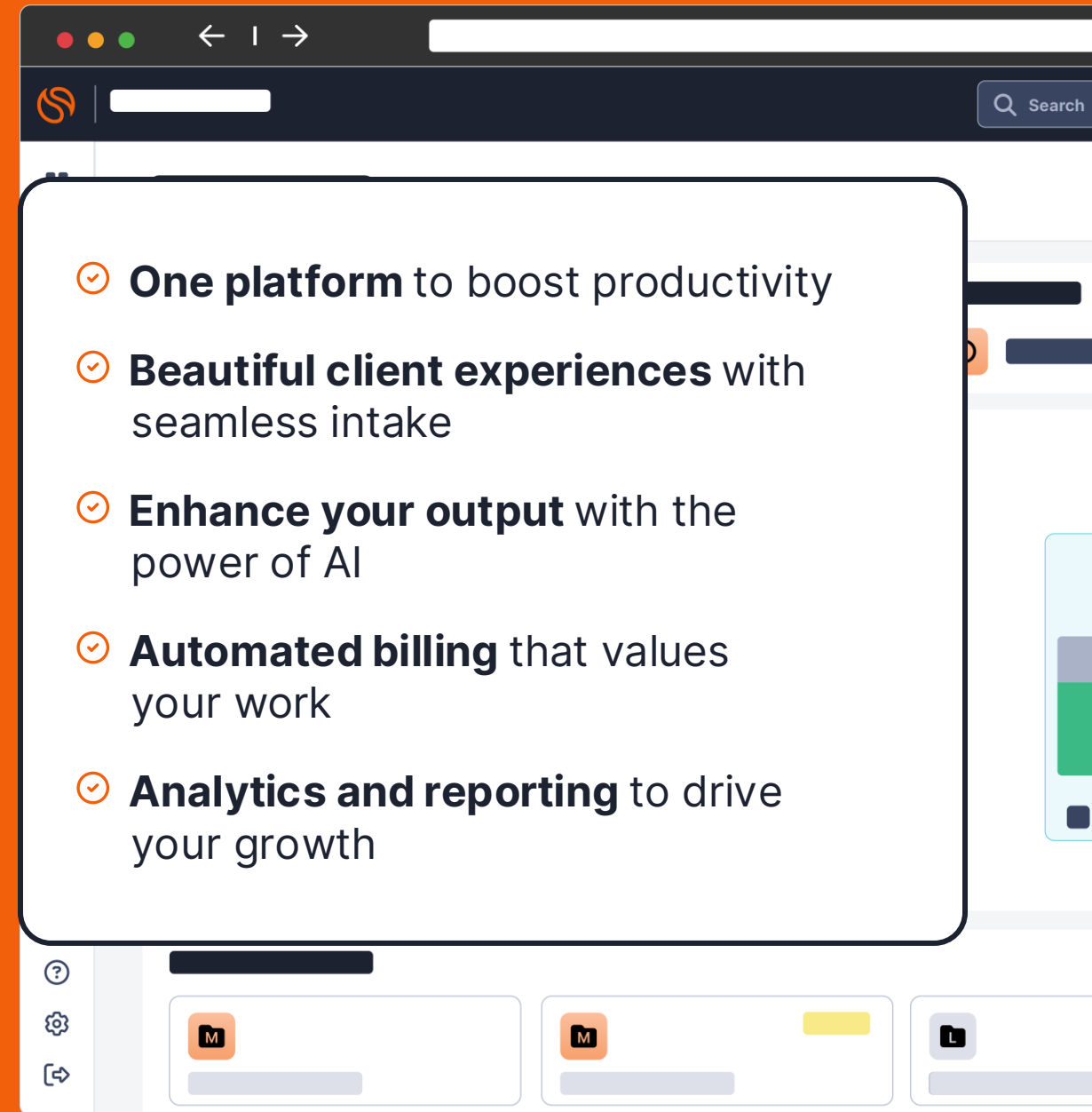
Jordan L. Turk

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- JD, University of Arkansas School of Law
- BA, The University of Texas at Austin
- Practicing Family Law Attorney in Texas
- Host, Hacking Law Firm Success



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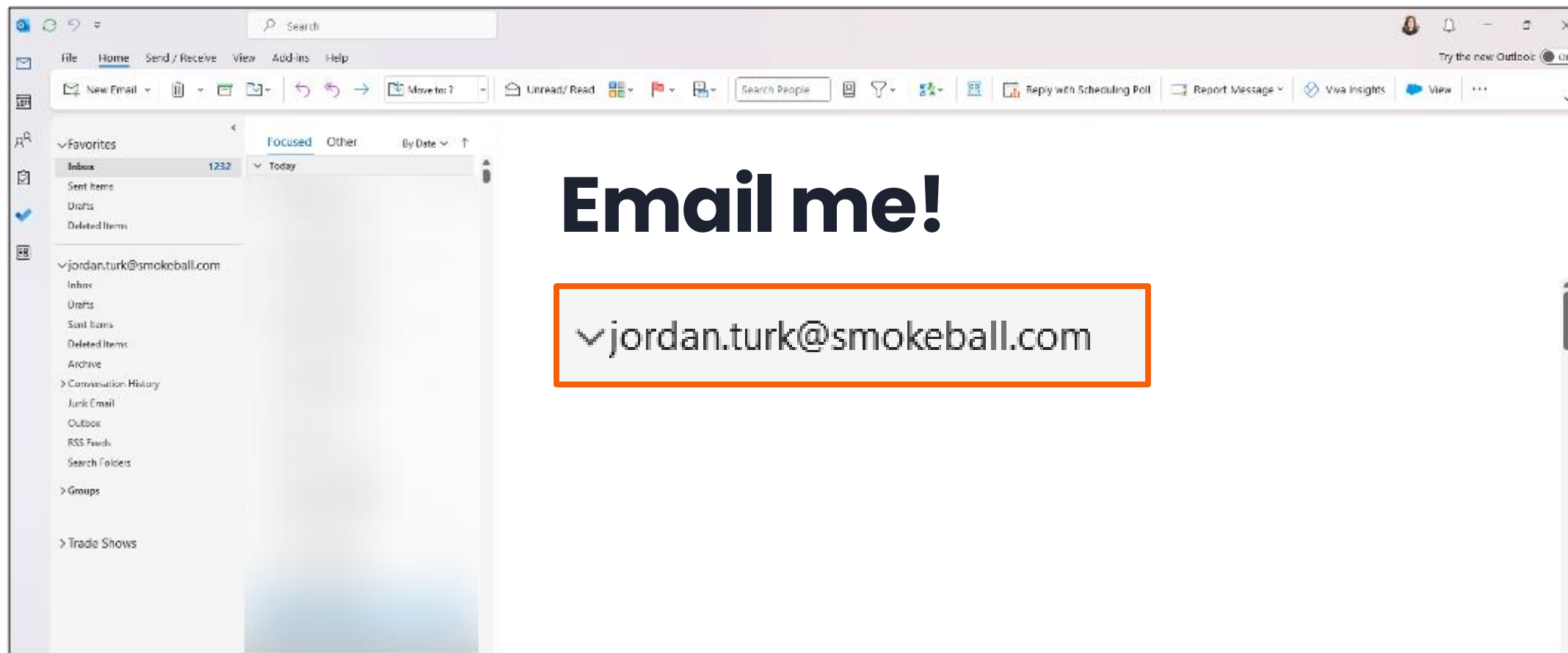
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AGENDA

- **Part 1: Overview and Core Functionality**
- **Part 2: Quick Access Toolbar**
- **Part 3: Keyboard Shortcuts in Outlook & Universal Microsoft Shortcuts**
- **Part 4: Useful Tips**
- **Part 5: Integrations into PMS and Other Applications**
- **Part 6: Q & A**



Overview and Core Functionality

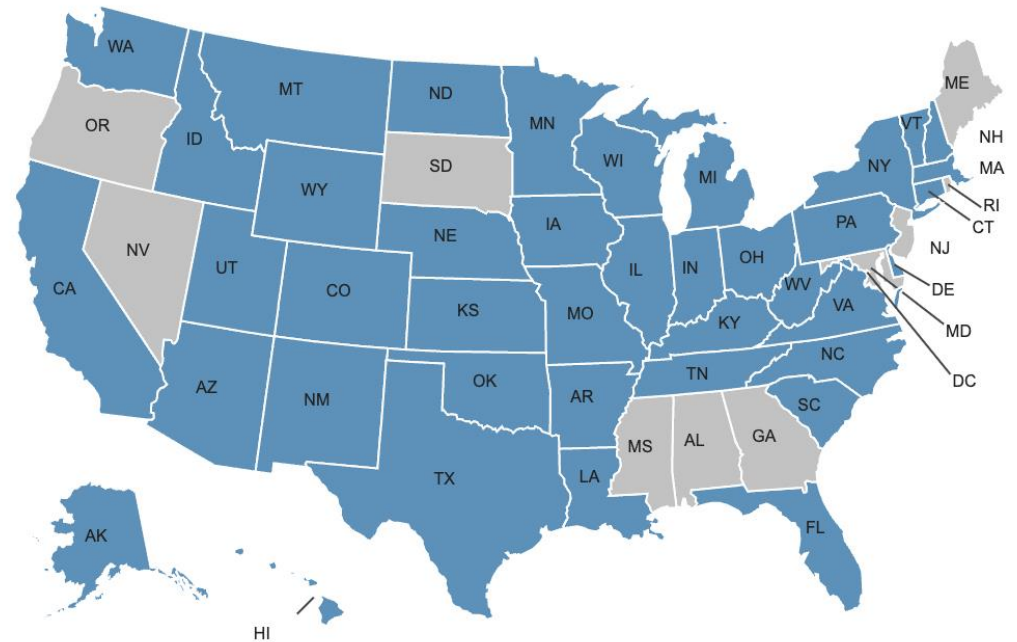
Ethical Considerations

Tech Competence:

40 States Have Adopted the Duty of Technology Competence

The duty to maintain the requisite knowledge and skill, a lawyer should keep abreast of changes in the law and its practice, **including the benefits and risks associated with relevant technology**, engage in continuing study and education and comply with all continuing legal education requirements to which the lawyer is subject.

(Emphasis added.)



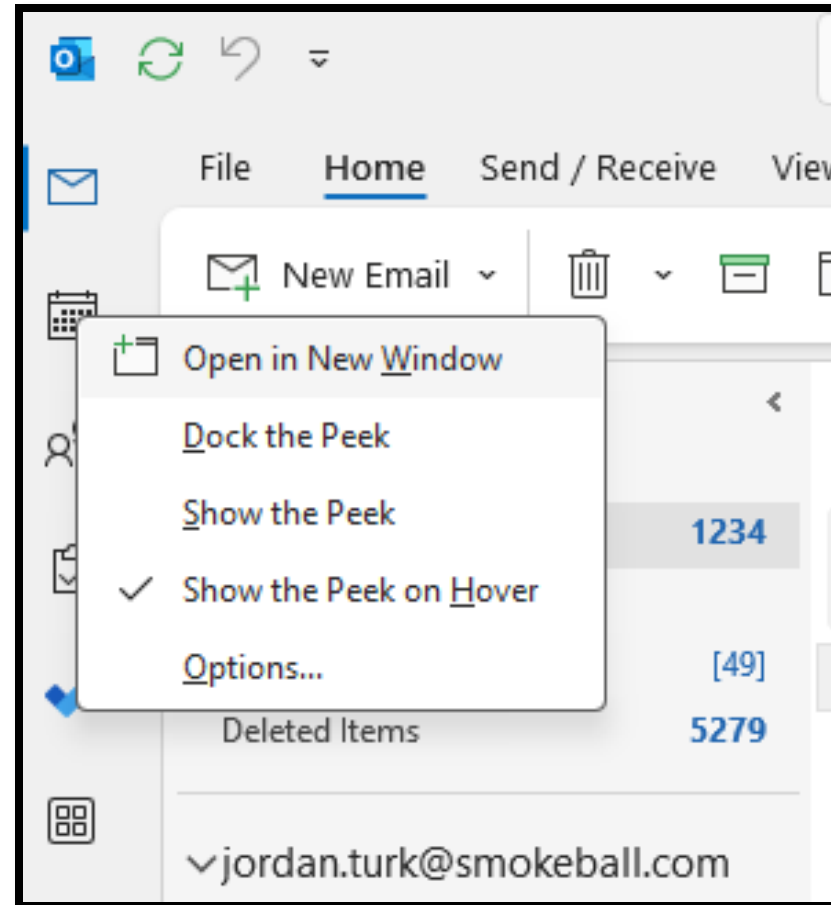


Why Should I Care as an Attorney?

- Attorneys need to know how their technology works, even something as basic as Outlook and Excel.
- Some attorneys (I've seen this especially in family law) outsource their Excel work, which to me is unacceptable. We have a duty to be competent in the tech we use, and Excel is **VITAL** to certain areas of law.
- Just because you know how to use the bare bones of the software doesn't mean you are utilizing it well. The goal is to give you the tools to work more efficiently so that your day is freed up to do substantive work on your cases.

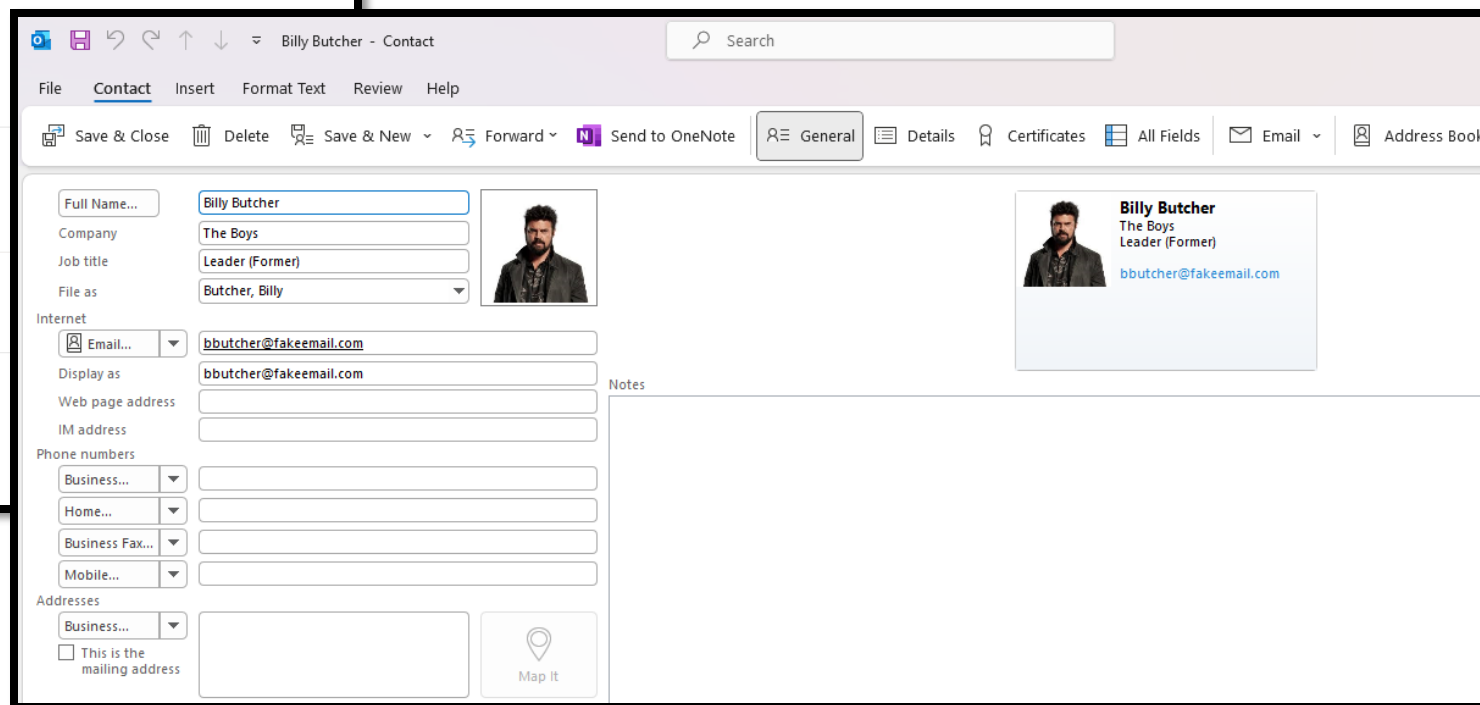
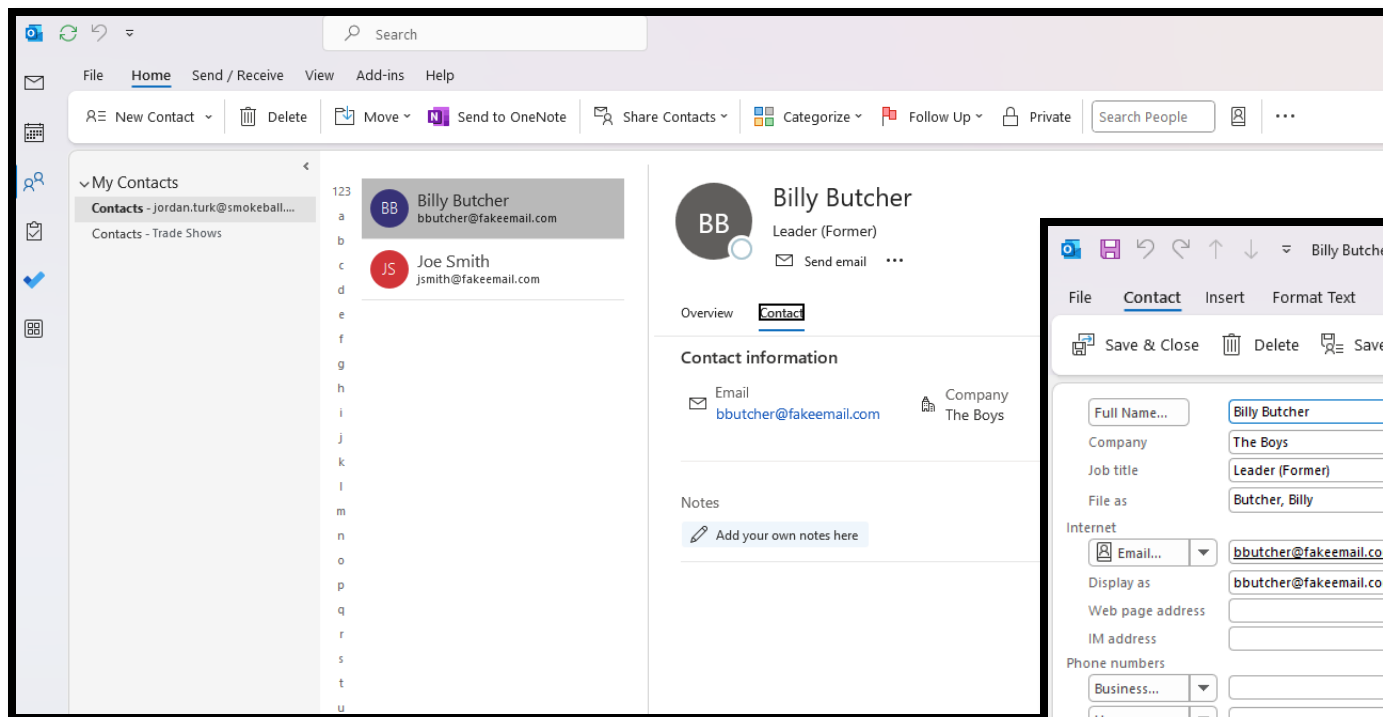
Open Calendar Into Separate Window/Tab

Right click on Calendar and select Open in New Window

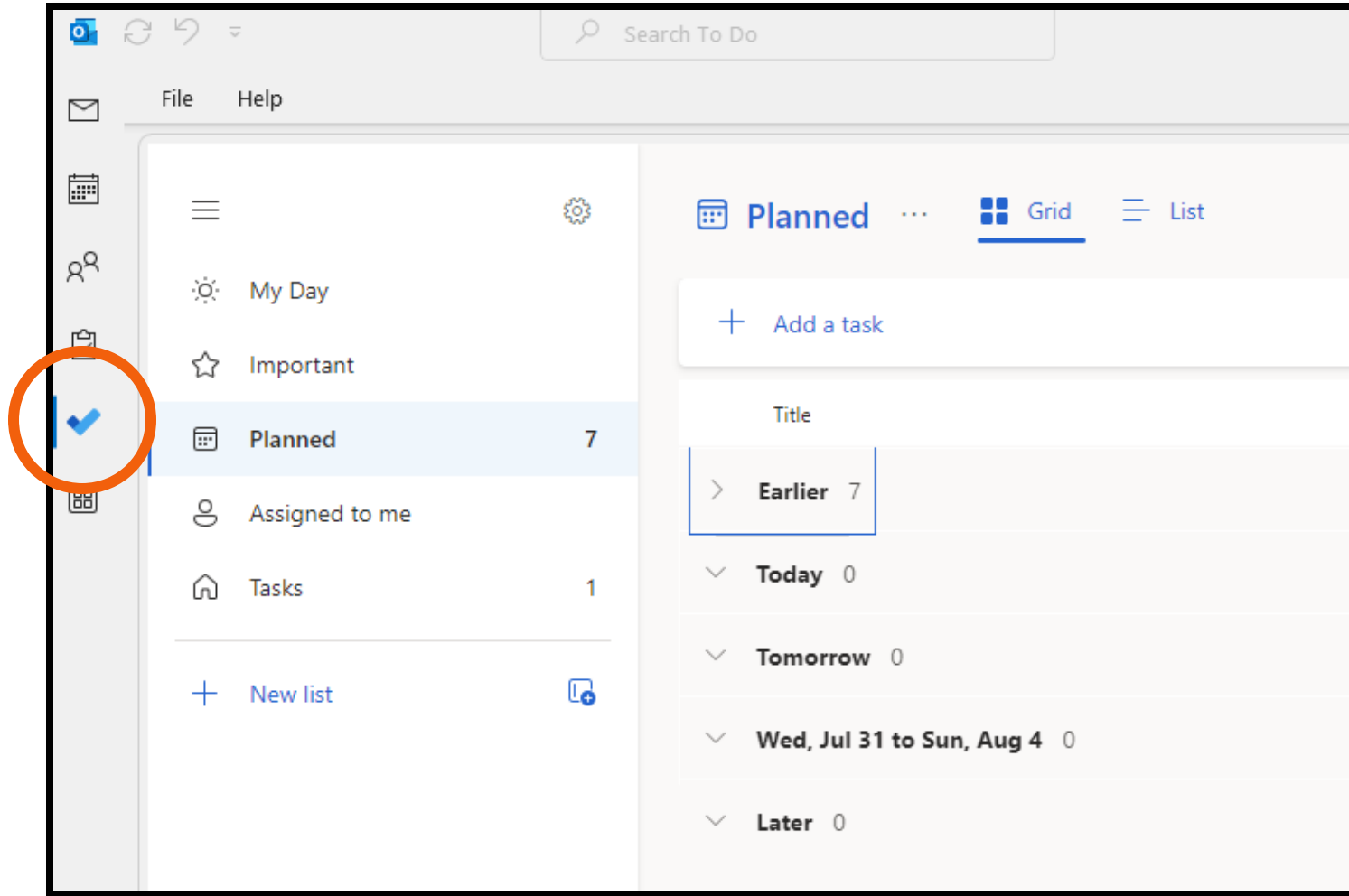


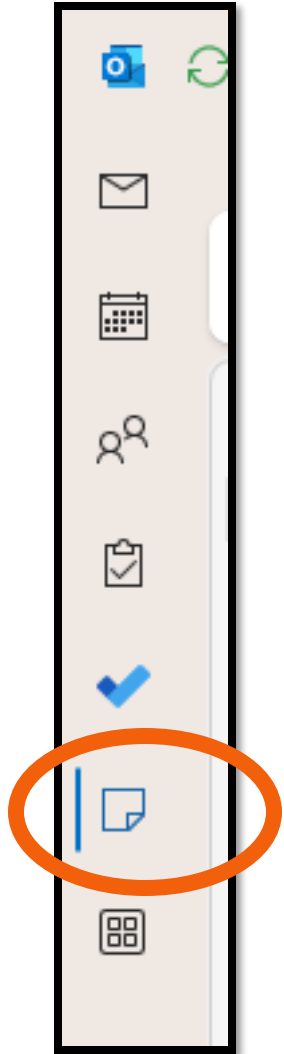
When I got emails from the Court or OC with scheduling dates, it was driving me crazy having to toggle between my calendar and mail – you can pop these out as separate boxes!

Add Detailed Info & Notes to Contacts



To-do Function





Notes Function

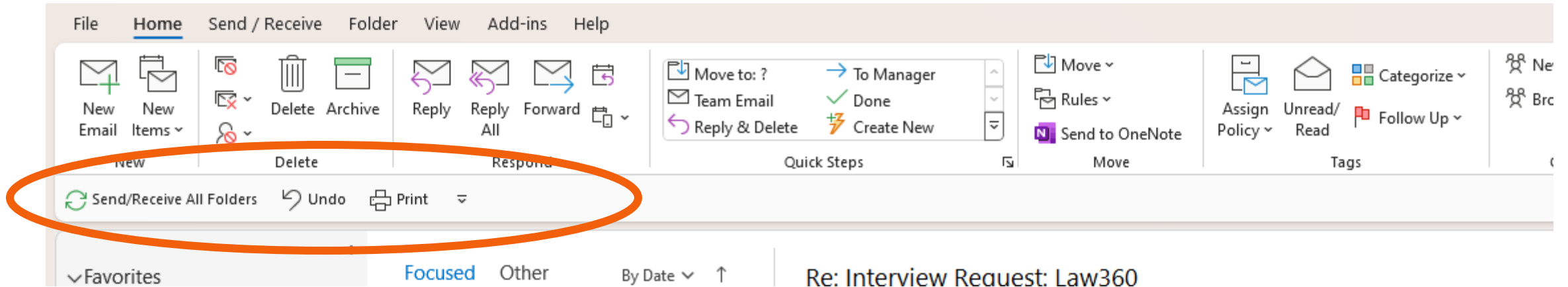
If you can't see it, click the bottom square icon and click Notes

In my opinion, better technology exists for note functionality, like OneNote or Evernote. It's clear that Microsoft kind of just tossed this feature in and the company doesn't spend time on upgrading it.



Quick Access Toolbar

You can change its positioning to make things more convenient:





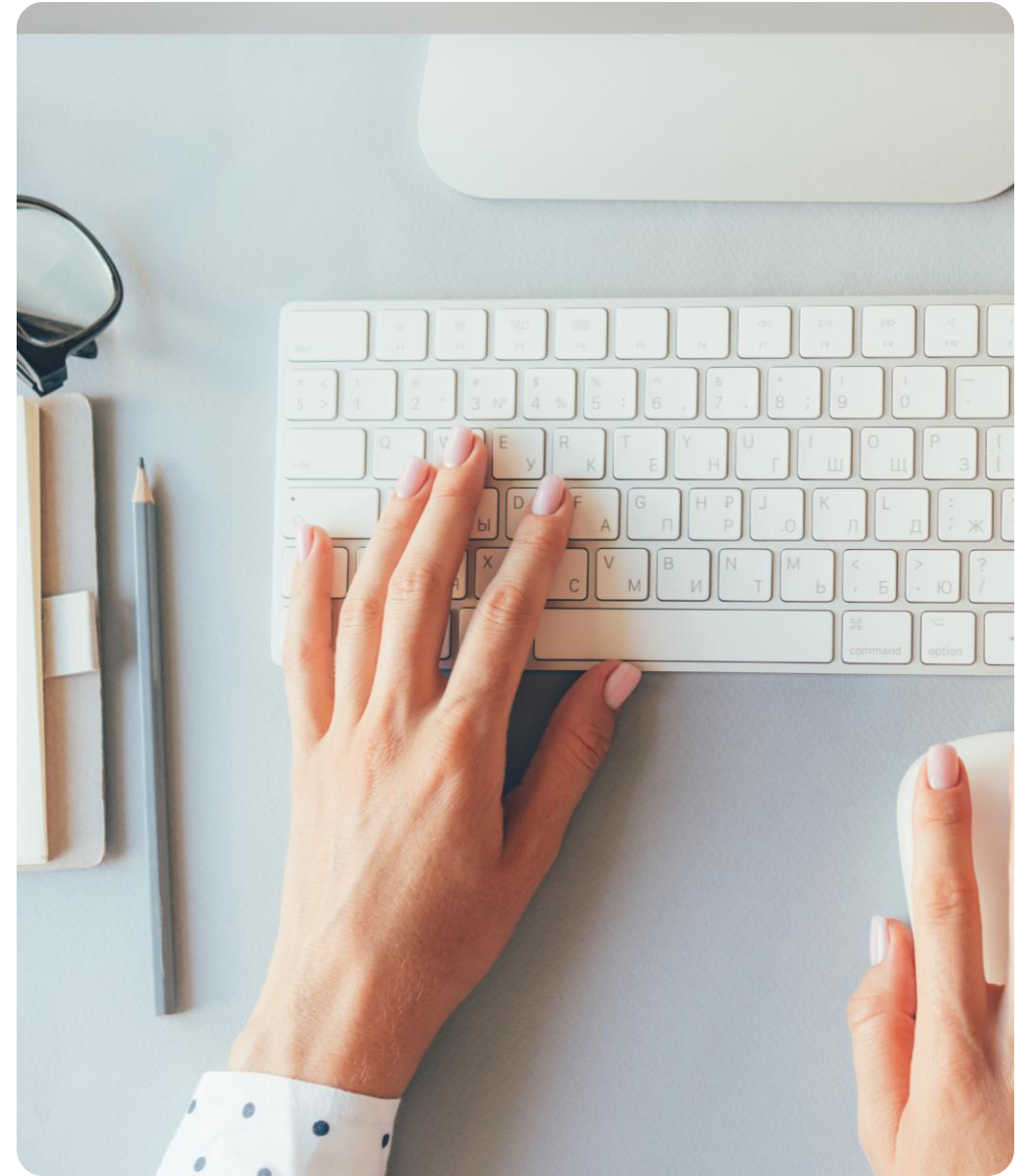
Keyboard Shortcuts



Outlook Keyboard Shortcuts

- CTRL + Enter = Send email
- CTRL + R = Reply
- CTRL + Shift + R = Reply all
- CTRL + N = New email or new calendar event
- Shift + Enter = Open email in new window
- Delete = Delete message or item
- CTRL + F = Forward
- CTRL + 2 = Go to Calendar

Get comfortable with these! The less you need to use your mouse, the better.





Universal Microsoft Keyboard Shortcuts

- Cut (CTRL + X), Copy (CTRL + C), and Paste (CTRL + V)
- CTRL + Z (undo)
- CTRL + Home/End
- CTRL + Click (highlights entire sentence)
- CTRL + Triple Click (highlights entire paragraph)
- CTRL + A (highlights everything)

Get comfortable with these! The less you need to use your mouse, the better.



Useful Tips

Useful Tips

- **Customize your text shortcuts:**
 - Ex. \$, to get this: Open new email, Insert Ribbon -> Symbol -> More Symbols -> Autocorrect -> replace with key that you would like. I use (s) for this one.
- **Fixing uppercase autocorrect:**
 - File ribbon -> Options -> Mail -> Spelling and Autocorrect -> unclick Ignore Words in Uppercase
- **Turn off notification sounds:**
 - File ribbon -> Options -> Mail -> Message arrival -> make sure Play a sound is NOT checked off.
- **Rules:**
 - Home Ribbon -> Move tab -> Rules (useful for junk or filtering out mail that's not junk, or for moving a bunch of discovery emails from the client into a separate folder so that it doesn't clog your inbox)



Lawyer Mental Health Check: I had to turn off my Outlook notification sound (referenced above) because it was causing me anxiety every time I'd hear it. At 11pm, during weekends, on my vacation, etc. Set the boundaries you need to.

Calendar – Auto-Dcline Conflicting Events

- Especially useful if your staff keeps double-booking you and you need that time (e.g., initial client consultations, hearing prep, etc.)
 - Calendar tab -> File -> Options -> Calendar -> Scroll all the way down -> click Auto Accept/Decline and update your preferences

Creating a Find Time Poll

An oft-overlooked feature! However, ridiculous move on Microsoft's part, in that now you can only vote if you have an Outlook account.

1. Choose an email to respond to or create a new email.
2. List attendees who are needed for the meeting in To and those who are optional in Cc.
3. Select Reply with meeting poll under the Home tab.
4. Choose the meeting options:
5. FindTime proposes ideal meeting times based on a review of the attendees' schedules (if any are available).
6. Pick a few times that are suitable for your meeting.
7. Enter the meeting location.
8. Toggle the ON/OFF switch under Poll Settings.
9. Select Insert to email. To invite attendees to the meeting and begin voting, choose Send.
10. A direct link to the voting website for your meeting will be sent to you.



Once you send a find time poll, it will automatically block out those times on your calendar until a winner is chosen!

Read Receipts

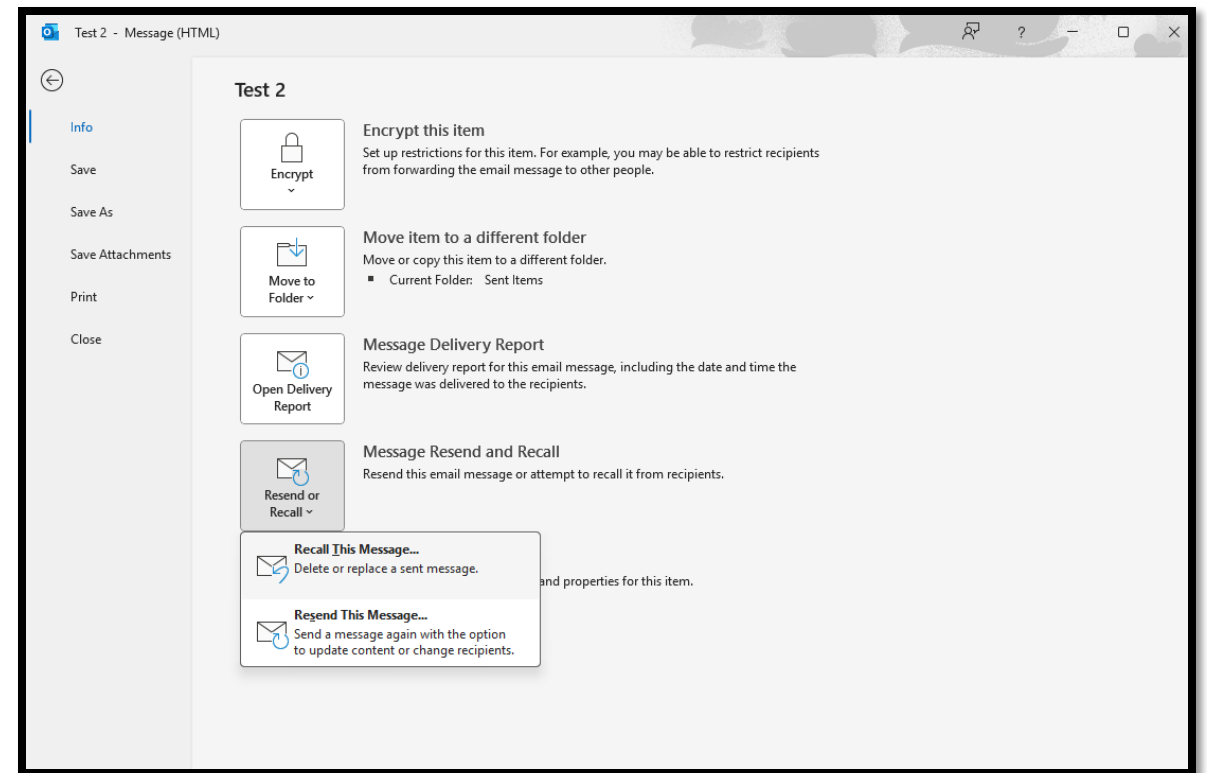
- Words cannot describe my hatred for Read Receipts
- **YOU CAN DISABLE THESE!**
- File -> Options -> Mails -> Tracking -> Select Never send a read receipt



I used to have an opposing counsel who requested read receipts and to me, unless I have given you cause to use it, it's insulting and, more importantly, annoying.

Undo Send Feature

- For when you desperately want to undo sending that email to opposing counsel where you questioned how he even obtained a law degree
- For Outlook desktop, use the Recall This Message feature. Open the sent email -> File -> Resend or Recall



Delayed Sending Rule (for shorter durations)

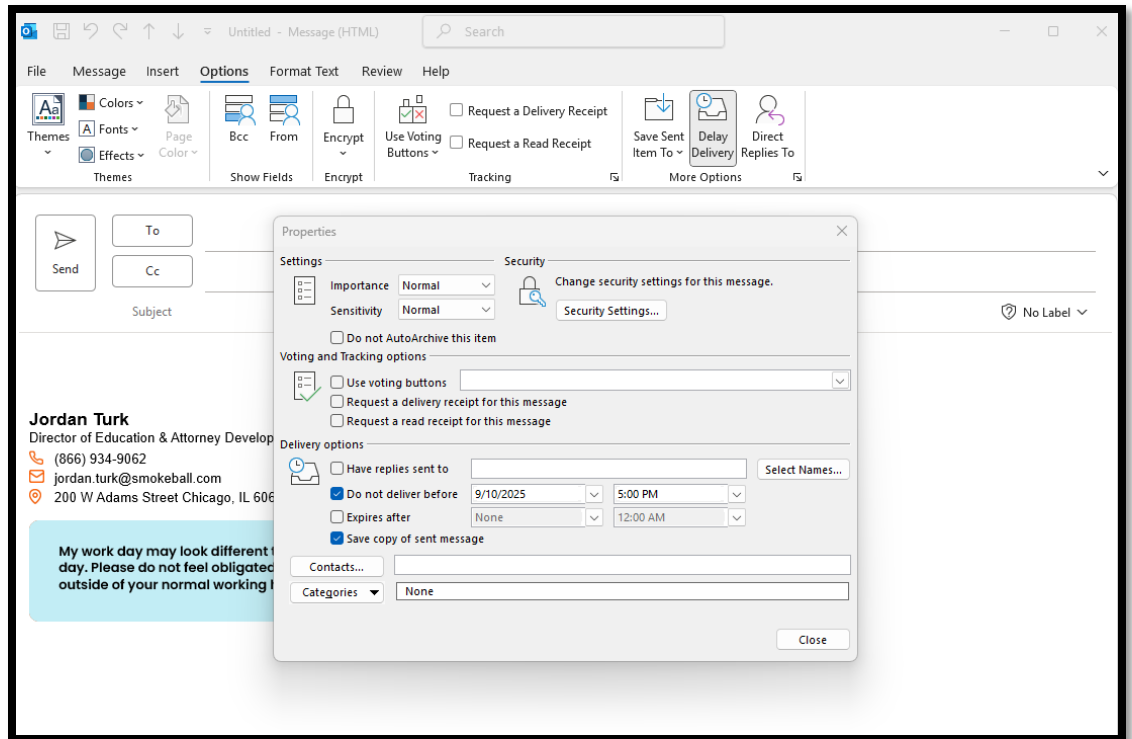
- When you have one of those “oops, I didn’t mean to hit Send yet!” moments
- You can delay the sending of emails for seconds or many minutes – handy to quickly undo a send or fix an attachment before it goes to OC
- For Outlook web, got to Settings -> find Compose and Reply -> find Undo send section -> set to your desired delay (0-10 seconds) -> click Save
- For Outlook Desktop, go to File tab -> Manage Rules & Alerts -> New Rule -> Select Apply rule on messages I send under “start from a blank rule” section -> click Next without selecting any conditions (this will have it apply to all outgoing emails) -> select “defer delivery by number of minutes” -> at the bottom, click on “a number of” to specify to amount of delay you want (ex: 1 min) -> OK -> Next -> Finish



Just because you enable it in the web app does NOT mean it will apply to the desktop app! Be careful and apply to both if you vacillate!

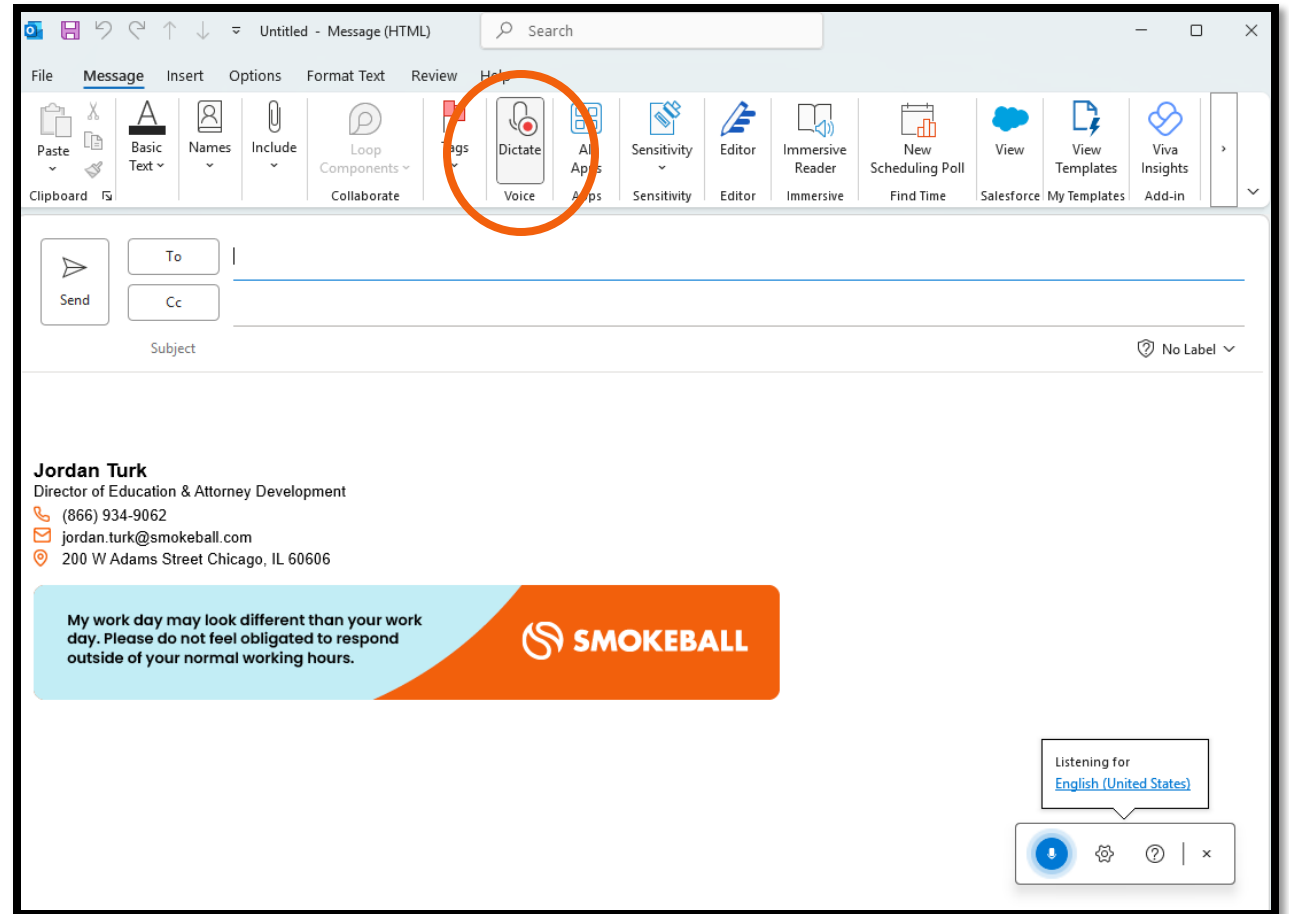
Delayed Send Rule (for longer durations)

- Especially helpful if you want to be respectful of others' time (including OC or an employee who feels the need to respond after hours but you don't want them to – boundaries are important!
- You can delay sending an email until a time during office hours. Especially helpful if you are writing an email at midnight to your paralegal but don't want them to freak out about it.
- Open the email -> Options tab -> Delay Delivery -> choose when you'd like it delivered -> Close -> Send



Dictation

- This technology has come a long way! Especially if you aren't that good of a typist, this feature will become your favorite.
- Just click the Dictate icon on your email message bar and start speaking! The text will appear contemporaneously.

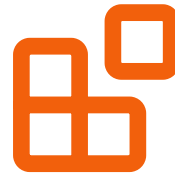




Additional Tips

To show emails you are cc'd on in italics: go to View>View Settings>Conditional Formatting>Add>Condition>Advanced>Field>Address fields>Cc>add your email address into Value box>Ok>Font>select desired format>Ok on all windows.

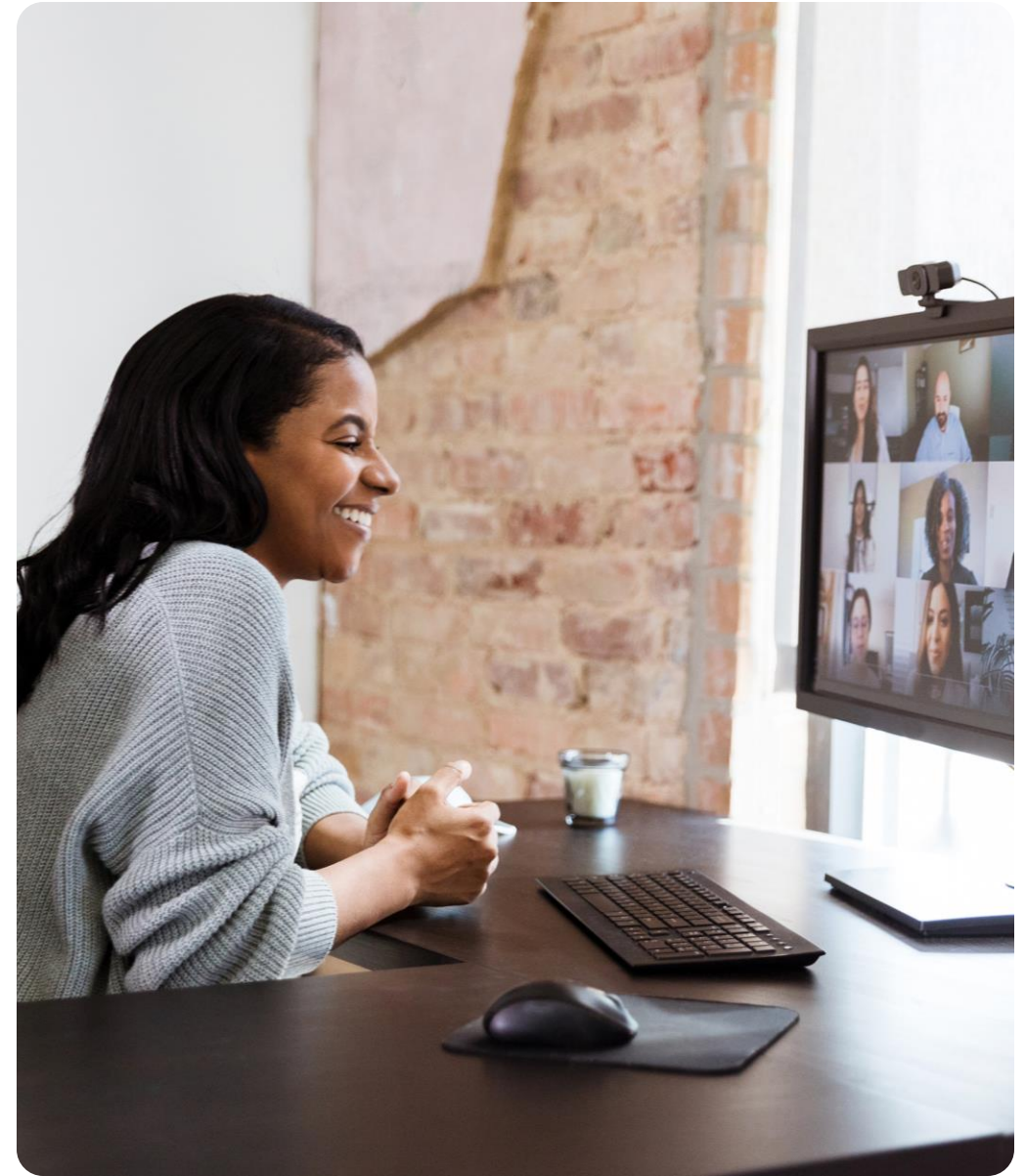
Multiple Time Zones Show at Once: Go to File -> Options -> Calendar -> Time zones -> Select Show a Second Time Zone (or Third if you desire) -> OK



Integrations

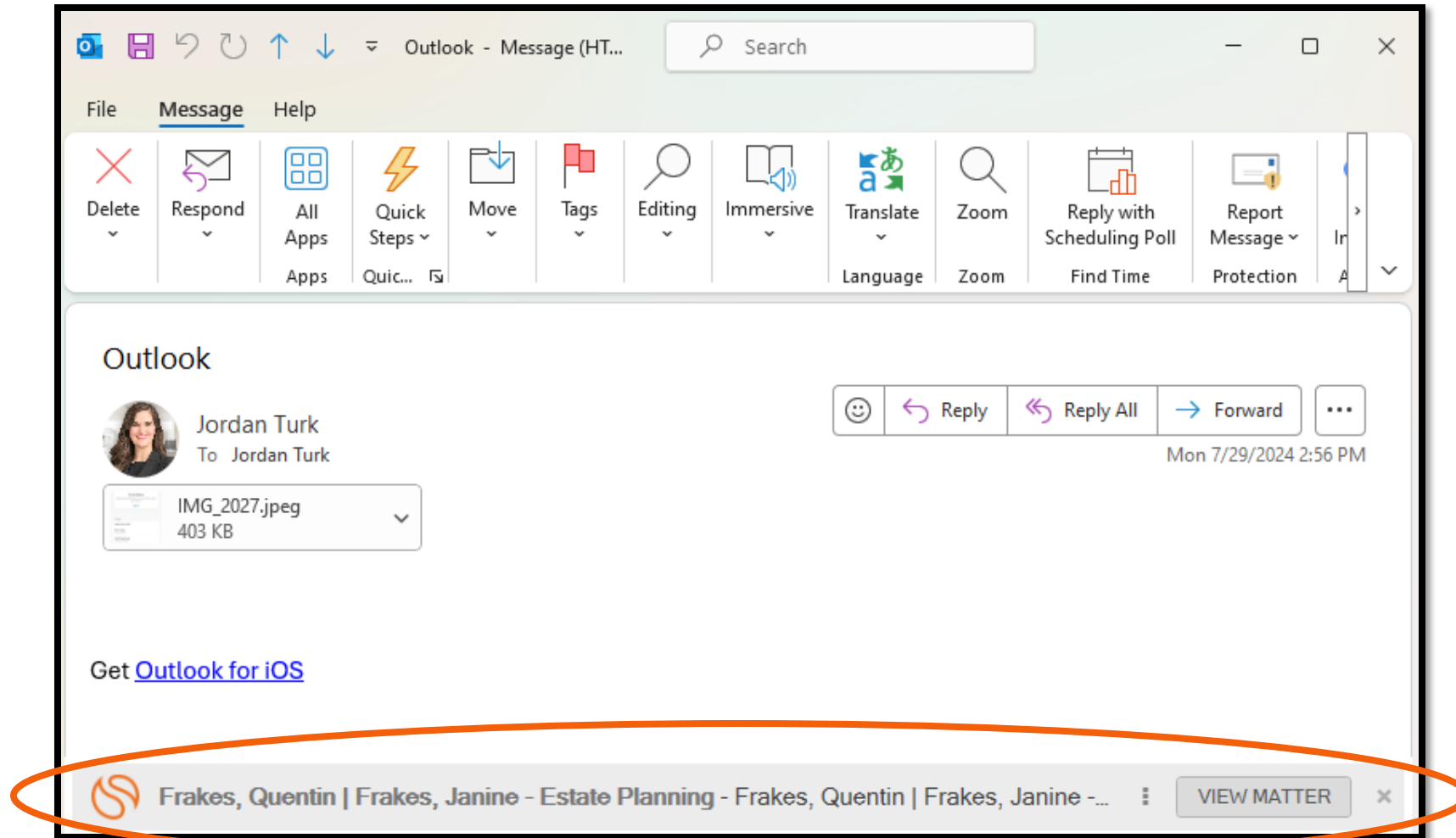


- First, install the Zoom plugin for Outlook
 - Calendar tab -> Home ribbon -> New Meeting. If your Zoom account is integrated, it will auto-populate the meeting info and Zoom details.
 - Can disable this if you want, but since most of my meetings are via Zoom, it's lovely.
 - **If you do remote consultations and meetings with clients/staff, this plugin is INVALUABLE**





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Quantin Frakes | Janine Frakes

2024-06-024 - Estate Planning

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Task

Court Rules

Phone Message

Activity

MATTER DETAILS

Info

2024-06-024

>

Client 1

Quantin John Frakes

>

Client 2

Janine Ann Frakes

>

Matter Type

Estate Planning

>

Estate Details 1

Estate plan for: Quantin John Frakes

>

Estate Details 2

Estate plan for: Janine Ann Frakes

>

Trust

The Frakes Family Trust

>

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Name	Status	To	From	Date modified	Date created	Size	Staff
Outlook				7/29/2024	7/29/2024	171 KB	JT
More Information Needed		Jordan Turk	jordan.turk@smokeball.com	7/29/2024	7/29/2024	26.5 KB	JT
IMG_2027				7/29/2024	7/29/2024	383 KB	JT
Estate Planning - Trust - Client 2				6/6/2024	6/5/2024	54.8 KB	HS
Estate Planning - Trust - Client 1				6/6/2024	6/5/2024	54.6 KB	HS
Estate Planning - Living Will - Client 2				6/6/2024	6/5/2024	30.2 KB	HS
Estate Planning - Living Will - Client 1				6/6/2024	6/5/2024	30.2 KB	HS
Engagement Letter and Fee Arrangement - Quantin John Frakes and 1 other				7/3/2024	7/3/2024	30.5 KB	NK
Certification of Trust				7/2/2024	7/2/2024	249 KB	NK

WIDGETS

TIMELINE

NEXT STEP

7/29/2024

Jordan Turk

SAVE

CONTACT DETAILS

Janine Ann Frakes

EpBasicSpouse

(773) 111-2221

(773) 111-3333

jfrakes@fakeemail.com

10138 Rawlins Avenue

McHenry, IL 60050

4/16/1975 (Age: 49 years)

Create Letter

View Details

Copy Details

Quantin John Frakes

EpBasicSpouse

(773) 111-2220

(773) 111-2221

(773) 111-2222

quentin@fakeemail.com

10138 Rawlins Avenue

McHenry, IL 60050

12/5/1972 (Age: 51 years)

Create Letter

View Details

Copy Details

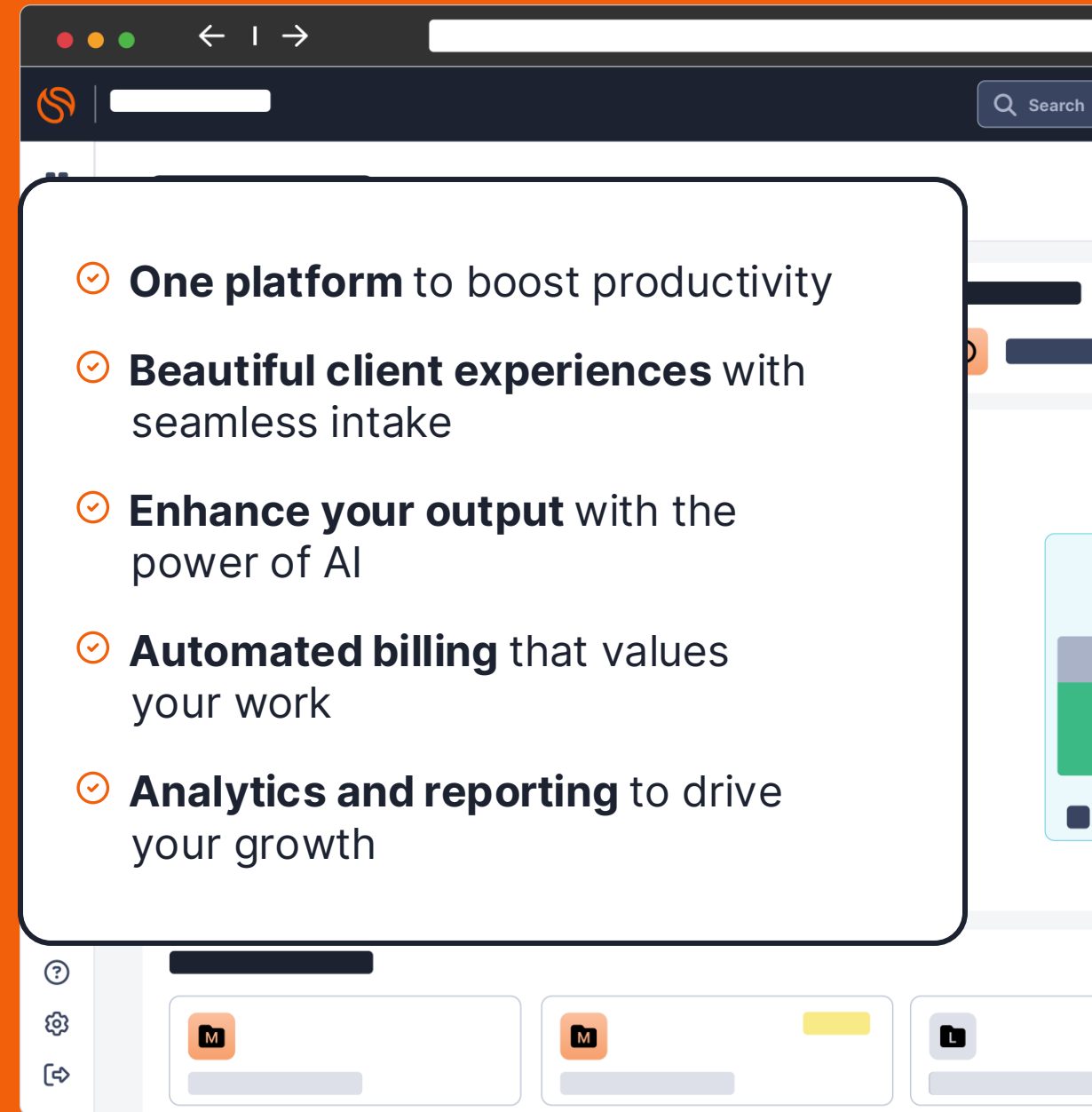
Last refreshed at 7/29/2024 3:48:04 PM

9 files 0 folders

Uploads, Downloads & Exports



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If **yes**, one of our law firm specialists will follow up.



Yes



Not at this time



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- Technology – 1.0 hour

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Thanks for joining!



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Development, Smokeball

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