Company challenge: Anthony's email

In this activity you will apply what you have learned about Gmail to help Anthony Dylan at On the Rise solve a business challenge.

* During this activity, you'll use your Gmail as if it were Anthony's account.

Task 1

You tell Anthony that his goals are easily accomplished using Gmail and that you're happy to help. You promise to set up his account in order to simplify his workload. As you begin collaborating, you immediately notice that Anthony has not updated his signature block. You offer to fix this. Create a new signature block for Anthony using the following information and formatting style. Once you are done, name the signature block "On the Rise." Make sure you save your changes.

Complete the following steps:

1. In your Gmail settings, create a new signature.
2. Add and format the text:

   Anthony Dylan
   Product Distribution & Operations
   On the Rise
   _616-555-5555 (w)_
   _616-777-7777 (m)_

3. Name the signature block "On the Rise."
4. Remember to save your changes.

Task 2

Anthony thanks you for updating his signature block. He now tells you that he needs help managing his contacts. He explains that it is his intention to send the survey to a group of external vendors and suppliers every month. He is concerned it will be very time consuming if he has to type each email each time.

You tell Anthony all he needs to do is create a contact label and assign vendors' and suppliers' emails. This will make bulk emailing a quicker process in the future. Help him do this now. Create a Contact Label named "On the Rise Vendors and Suppliers" and add the suppliers and vendors you have been provided.

Complete the following steps:

1. From your Contacts, create a label named "On the Rise Vendors and Suppliers."
2. Add a few of your colleagues to the label.

Task 3

As Anthony will be sending a similar email each month, you suggest creating a template that he can re-use.

Help Anthony by first enabling templates in Gmail. Next, create a template based on the information he has provided. Name the template "OTR Monthly Survey" and save it. Don't forget to include Anthony's new signature line!

Complete the following steps:

1. Open your Gmail settings and ensure you have templates enabled.
2. Compose a new message. Copy and paste the language from On the Rise Survey Template into the body of the email.
3. Add the email signature "On the Rise."
4. Name the template "OTR Monthly Survey" and save it. Select **More options**, hover over **Templates**, choose **Save draft as template**, then select **Save as new template**.
5. Once the template is saved, you can discard the draft email used to create the template.

Task 4

It is a new month and Anthony is getting ready to launch the initiative. He asks you to prepare an email, insert the "OTR Monthly Survey" template, and apply the "On the Rise Suppliers and Vendors" contact label as the "To:" recipient.

Anthony also has a few additional requirements. He asks you to include company partner owner, Thomas Omar, as the "Cc:" recipient. He also wants you to include a shareable link to the "On the Rise Monthly Newsletter," available in Google Drive and ensure the link permissions are set to "View Only."

Once you are done, send the email. Then go to your Inbox and reply to any messages that you have received from others in your group.

Complete the following steps:

1. Compose a new email using the "OTR Monthly Survey" template you created. Select **More options**, hover over **Templates** and select the name of your template to insert.
2. Apply the "On the Rise Suppliers and Vendors" contact label as the "To:" recipient.
3. Add Thomas Omar as a "Cc:" recipient. For course purposes, use your own email address for Thomas.

Add a shareable link to the On the Rise Monthly Newsletter. For this step, you will share a file that you own so click the following link On the Rise Monthly Newsletter and make a copy of the file when prompted.

4. In your email message, choose **Insert files using Drive.** Locate and insert your copy of the newsletter.
5. Send the message and when prompted, check that the link permissions are set to "View Only."
6. Check your Inbox for the message. Open the message and reply to it.

Task 5

Anthony begins to receive many responses from vendors and suppliers. As the emails all have the same subject, messages are being grouped in a single conversation thread, known as conversation view. You suggest that Anthony may prefer a chronological view of his messages and show him how this changes the appearance of his messages. Anthony tells you he prefers conversation view, so you change it back.

Change views to show Anthony both chronological and conversation views.

Complete the following steps:

1. Open your Gmail "Quick settings" panel, then scroll down and disable "Conversation view." Notice how this affects the messages in your inbox.
2. Turn conversation view back on.

Task 6

Anthony wants to easily organize all the messages he is receiving. He's also worried that

certain messages might be going directly to Spam.

Help Anthony create a Gmail label called "On the Rise Suppliers and Vendors." Then, assign a few messages to that label.

Next, check Anthony's Spam folder. If you find any legitimate messages, mark them "Not Spam."

Complete the following steps:

1. Create a new Gmail label. Choose **More** in the label list and scroll down to select **Create new label.** Name the label "On the Rise Suppliers and Vendors."
2. Apply the label to the messages created in Task 4.
3. Check **Spam** for legitimate messages. If you find any, mark them **Not spam**.

Task 7

Anthony often receives messages from On the Rise partner owner Thomas Omar. These messages are always important and Anthony wants to have them easily accessible.

Search for a message from Thomas. You suggest marking messages from Thomas Omar as important. You also offer to apply a filter so all his future messages are automatically marked as important too.

Complete the following steps:

1. Check that **Show markers** for Importance markers is enabled in your Gmail settings.
2. Search for a message from Thomas Omar. For course purposes, use your own email address as Thomas Omar's email, and search for the message with the title "OTR Monthly Survey".
3. Is the conversation marked as important? If it isn't, mark it as important now.
4. Create a filter for messages like these. Select the **Show search options** icon in the search box, then choose **Create filter**. Enable **Always mark as important** and apply the filter to any matching conversations.

Tip: You can edit and delete filters from your Gmail settings page.

Task 8

In his email, Thomas asks Anthony if he would share some of his survey findings next Wednesday during the On the Rise weekly Leadership Meeting on Google Meet. Anthony agrees and tells you he will prepare a Google Slides presentation next Monday.

To help Anthony stay organized, you offer to create a task for him in Gmail. Create a task for next Monday and name it "Prepare Google slide deck with survey findings."

Complete the following steps:

1. Create a task in your Gmail for next Monday, 9am.
2. Name your task "Prepare Google Slides presentation with survey findings."
3. Confirm that the task appears on your Google Calendar. Tip: If you cannot see the task, ensure that "Tasks" is selected beneath "My calendars" in the left hand panel.

Task 9

Anthony tells you that in two weeks time he will be out of office from Monday to Friday. He knows he will have limited access to email. You offer to set up an automatic out-of-office notification. Set one up with the information he has provided you.

1. Set up an Out-of-Office AutoReply as follows:
   a. Begin two weeks from now, Monday through Friday.
   b. Enter "Out of office" as the subject.
   c. Add the response text.

   Thank you for your email. I am presently out of office with limited access to email. For all inquiries, please contact the Product Distribution and Operations team at 616-888-8888.

   I will be back in office next week and will promptly respond to your email.

   Thank you for your understanding.

2. **Do not enable** the Out-of-Office AutoReply.

Case wrap up

Anthony presents the survey feedback at the weekly On the Rise Leadership Team Google Meet and partner owners, Seroja Malone and Thomas Omar, are very impressed. The feedback is extremely useful, as it allows the team to identify numerous areas for improvement. They praise the initiative and look forward to Anthony's next report.

Anthony thanks you for helping him set up his Gmail account. He now feels confident that he will be able to send his monthly survey emails without too much effort. In fact, he tells you that he plans to use the features you have shown him to simplify many of his other On the Rise communications and to better organize his Inbox.