

Office Productivity: Technology Tools and Tips

November 14, 2019





EMAIL Management

CA Uday Shah



Gmail by Google

MS Outlook



Email Management



INBOX



READING



ORGANISE –
LABELS/ FOLDERS



SEARCH

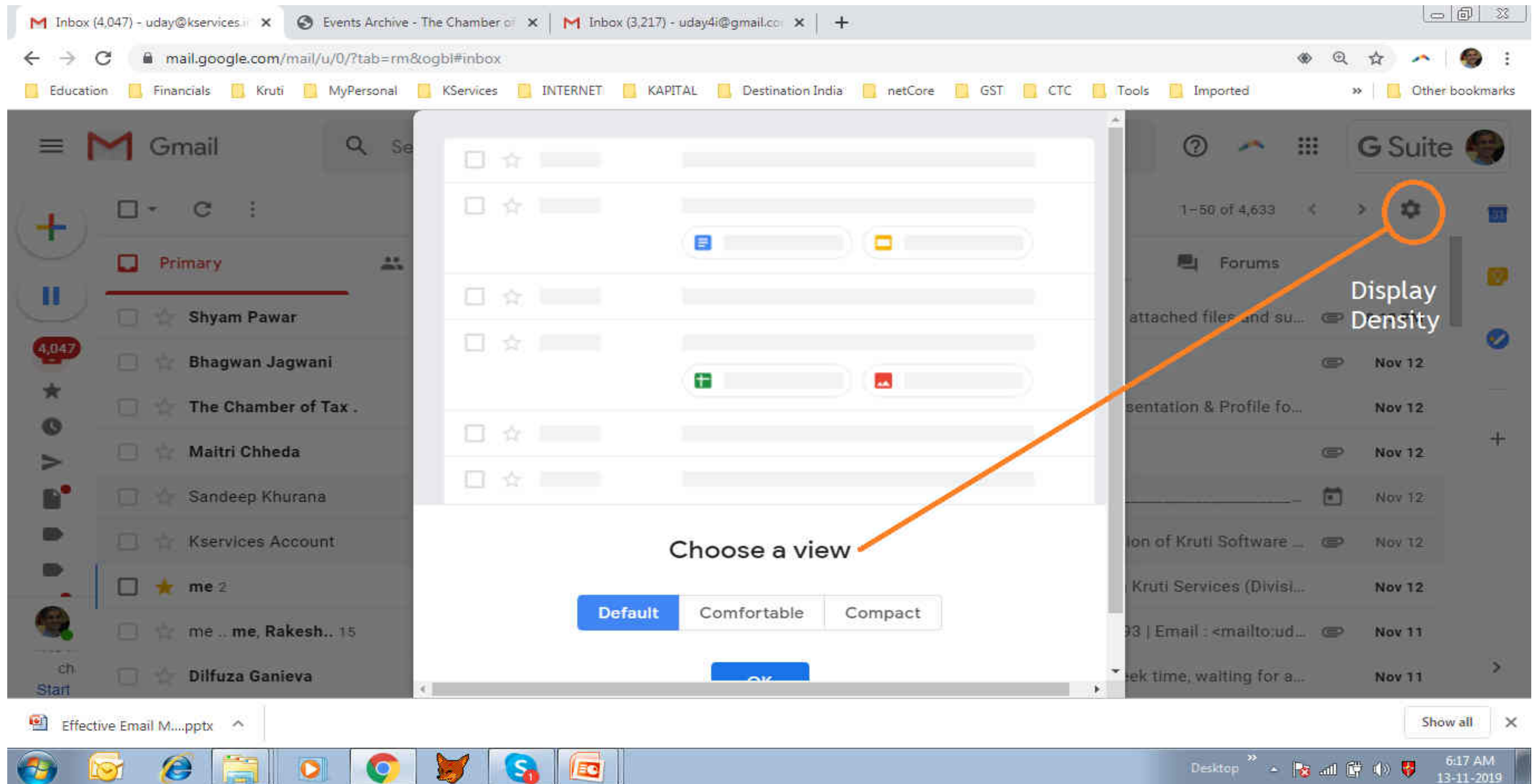


RULES AND ALERTS



ARCHIVE & HOUSE
KEEPING

- First Impression is lasting impression
- Configure your Inbox for look that you prefer to read



Inbox

The screenshot shows a Gmail inbox in a web browser. The browser's address bar displays the URL `mail.google.com/mail/u/0/?tab=rm&ogbi#inbox`. The Gmail interface includes a search bar, a sidebar with navigation icons, and a main inbox area. The inbox is currently in 'Primary' tab view. A blue box with the text 'TAB view using Configure Inbox' is overlaid on the inbox list. An orange circle highlights the gear icon in the top right corner of the inbox, and an orange line points from this circle to the blue box. The inbox list shows several emails, including one from 'Shyam Pawar' with the subject 'Rectification letter S...'. The Windows taskbar at the bottom shows the date and time as '11/18/2019' and '6:20 AM 13-11-2019'.

1-50 of 4,633

Primary Social Promotions 8 new Updates 6 new Forums

Shyam Pawar Rectification letter S... 8:13 PM

Bhagwan Jagwani Circular Clarification Nov 12

The Chamber of Tax . Re: Presentation & Profile for Nov. 14 workshop - Dear Mr. Shan Kindly send us your Presentation & Profile for ... Nov 12

Maitri Chheda Back up presentation of Adarsh from 2016 Nov 12

Sandeep Khurana Accounting services collaboration - ... Nov 12

Kservices Account (no subject) - PFA Thanks & regards, Rubi Kalwar Junior Accountant Kruti Services (Division of Kruti Software ... Nov 12

me 2 Boomerang-Returned This is Check email - Message moved to top of Inbox by Boomerang (view this conversati... Nov 12

me .. Rakesh.Jadh. 15 ENET - SOFT TOKEN - QUERIES - URGENT - Kruti Software - Dear Udayji , As per our detailed discussion find re... Nov 11

Dilfuza Ganieva RE: Outstanding Statement - Monthly fees settled today Balance will be done within a week time, waiting for a... Nov 11

Effective Email M....pptx

Desktop 6:20 AM 13-11-2019

Ways to Organize Inbox

- Using Folders
- Using Colors
- Using Views

- Color messages sent to in
- Show messages sent **only to me** in

To view or edit your coloring, and for more advanced options, click on "Automatic Formatting" above.

Automatic Formatting

Rules for this view:

- ☒ Unread messages
- ☒ Unread group headers
- ☒ Submitted but not sent
- ☒ Expired e-mail
- ☒ Overdue e-mail
- ☒ Mail sent to uday@ksservices.in
- ☒ Mail sent to uday@krutisystems.com
- ☒ Mail received from ICAI

Properties of selected rule

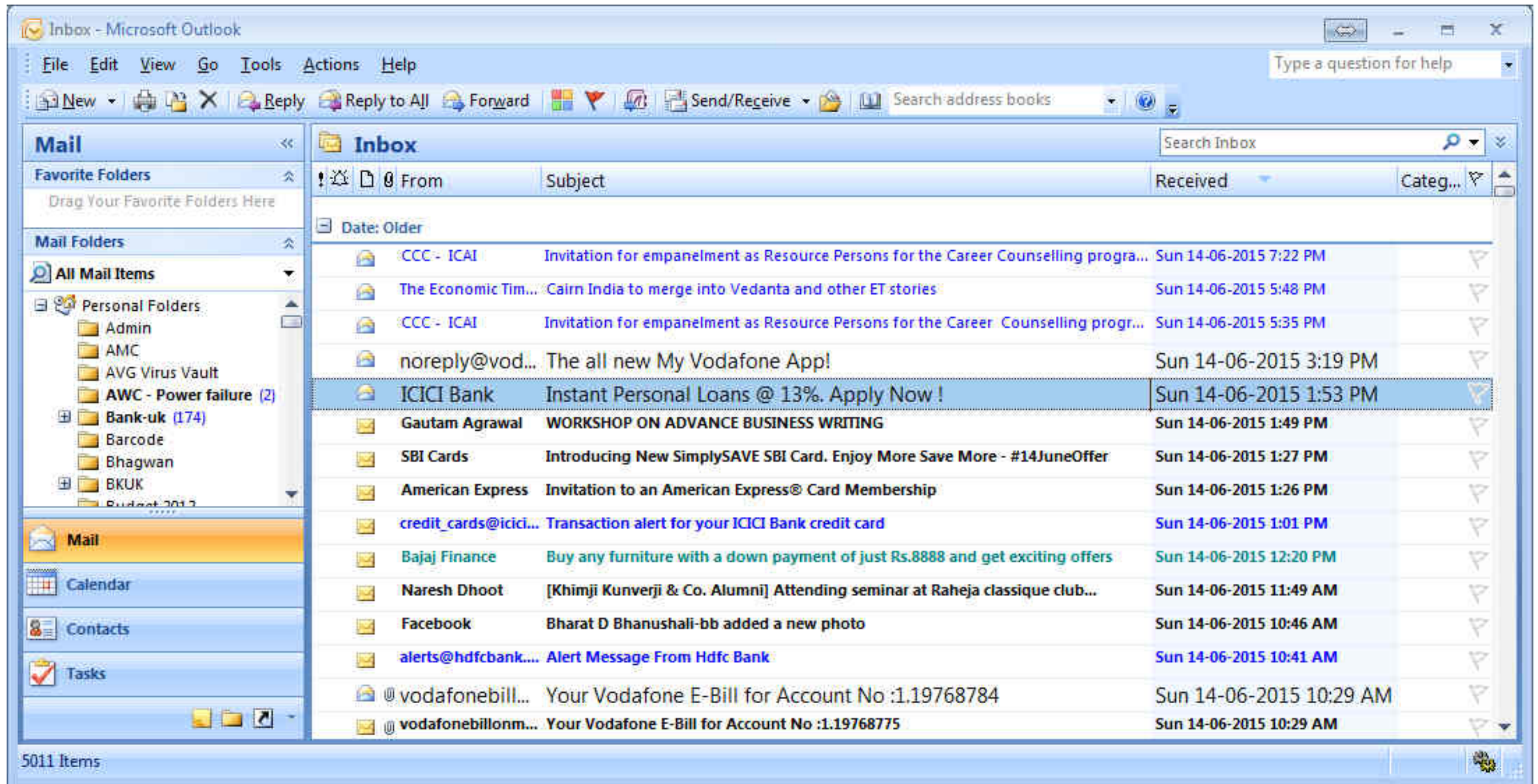
Name:

Font...

Condition...

Inbox

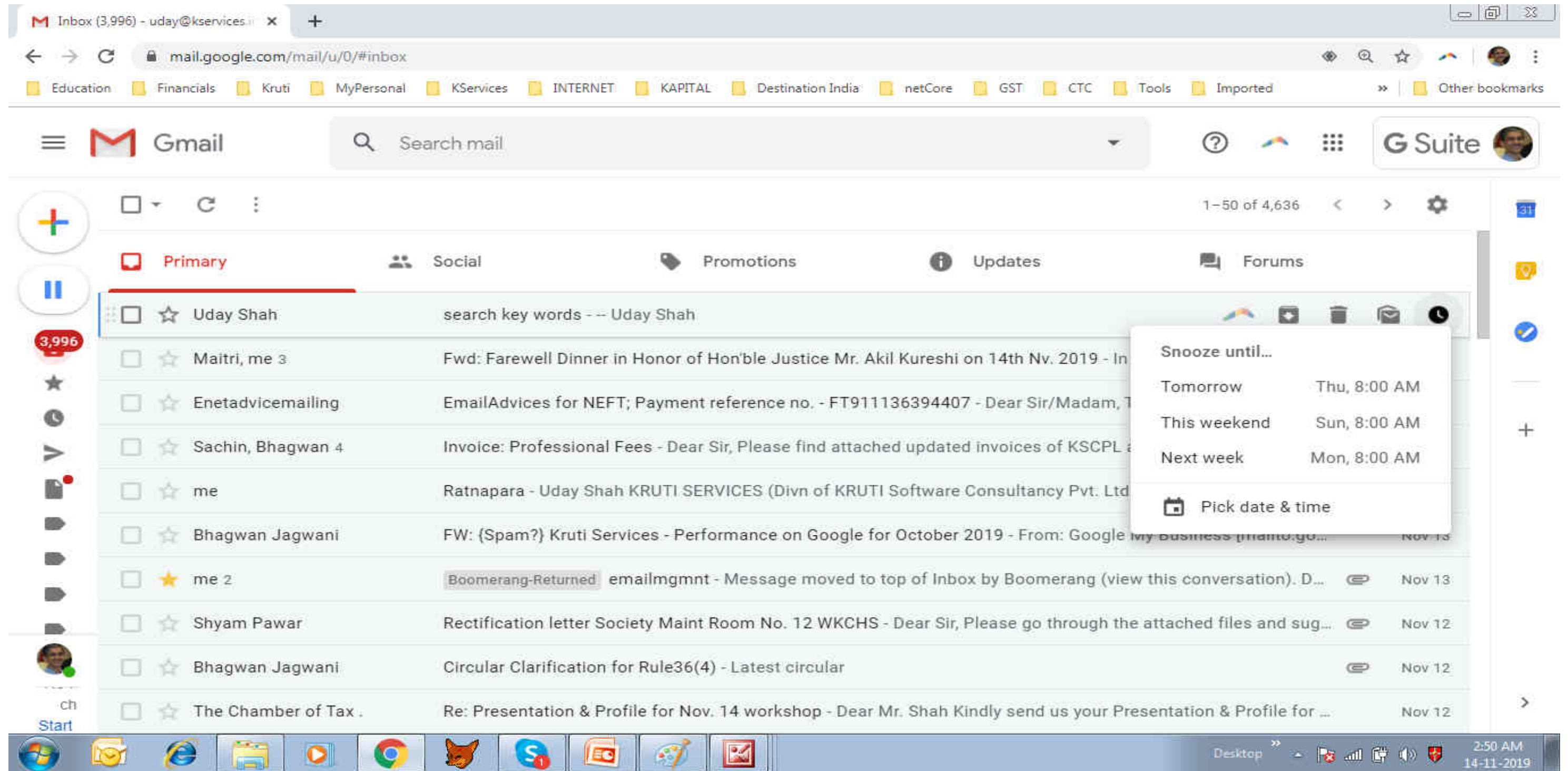
From	Subject
CCC - ICAI	Invitation for empanelment as Resource Persons for the Co
The Economic ...	Cairn India to merge into Vedanta and other ET stories
CCC - ICAI	Invitation for empanelment as Resource Persons for the Co
noreply@vod...	The all new My Vodafone App!
ICICI Bank	Instant Personal Loans @ 13%. Apply Now !
Gautam Agrawal	WORKSHOP ON ADVANCE BUSINESS WRITING
SBI Cards	Introducing New SimplySAVE SBI Card. Enjoy More Save More - #14
American Express	Invitation to an American Express® Card Membership



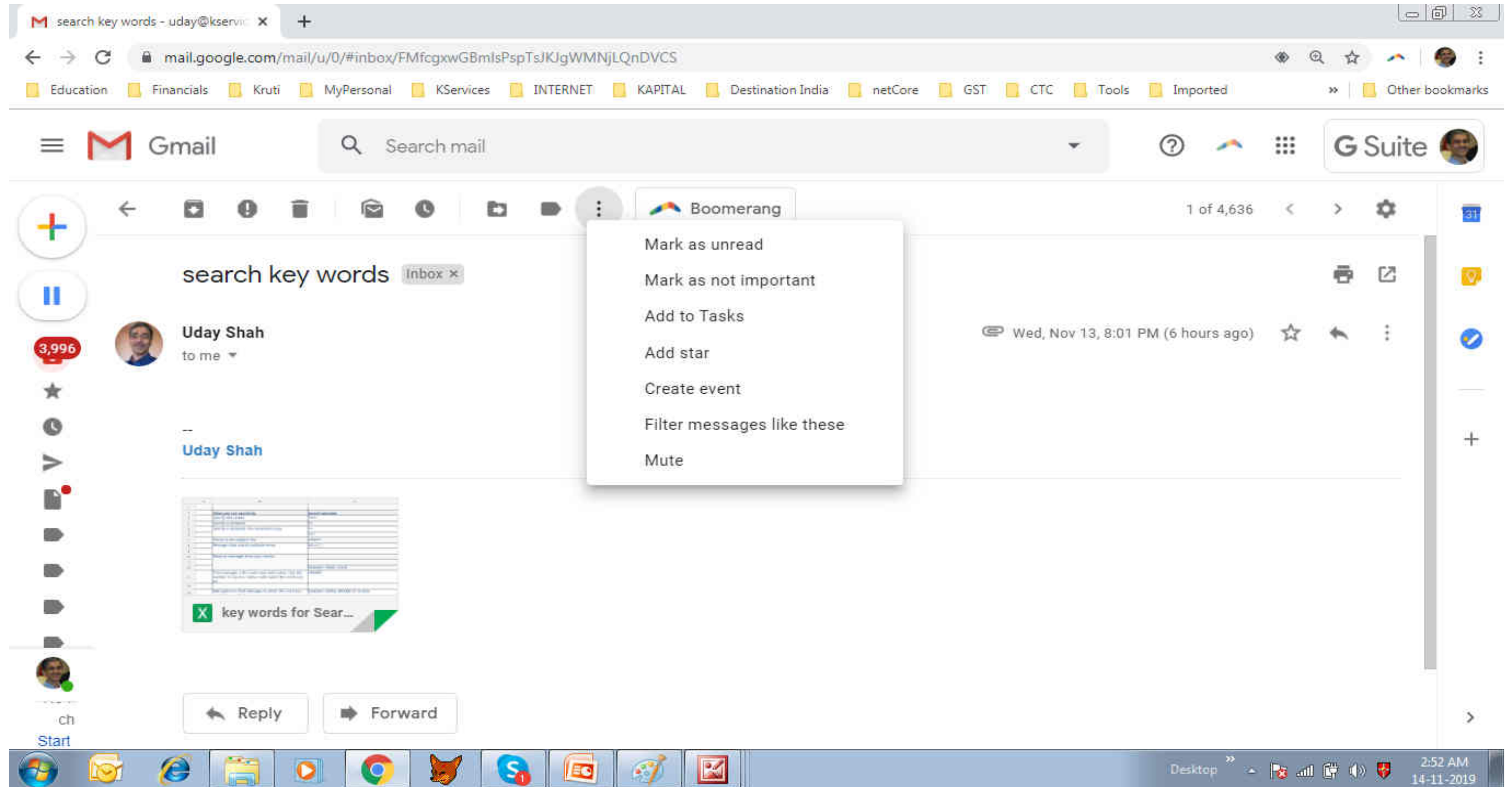
- Read the Subject and Sender
- Open email, ONLY at appropriate time
- Open email and convert it to Actionable point - assign/ forward, convert to task/ appointment/ reminder, park/ label

- Emails can be organised using *Label*
- Each Label can be viewed as *Folder*
- Filters can be created to automat *Labeling Email on receipt*
- *Plus+* address to automate Label (Gmail.com users ONLY)
- Flag for Follow-up

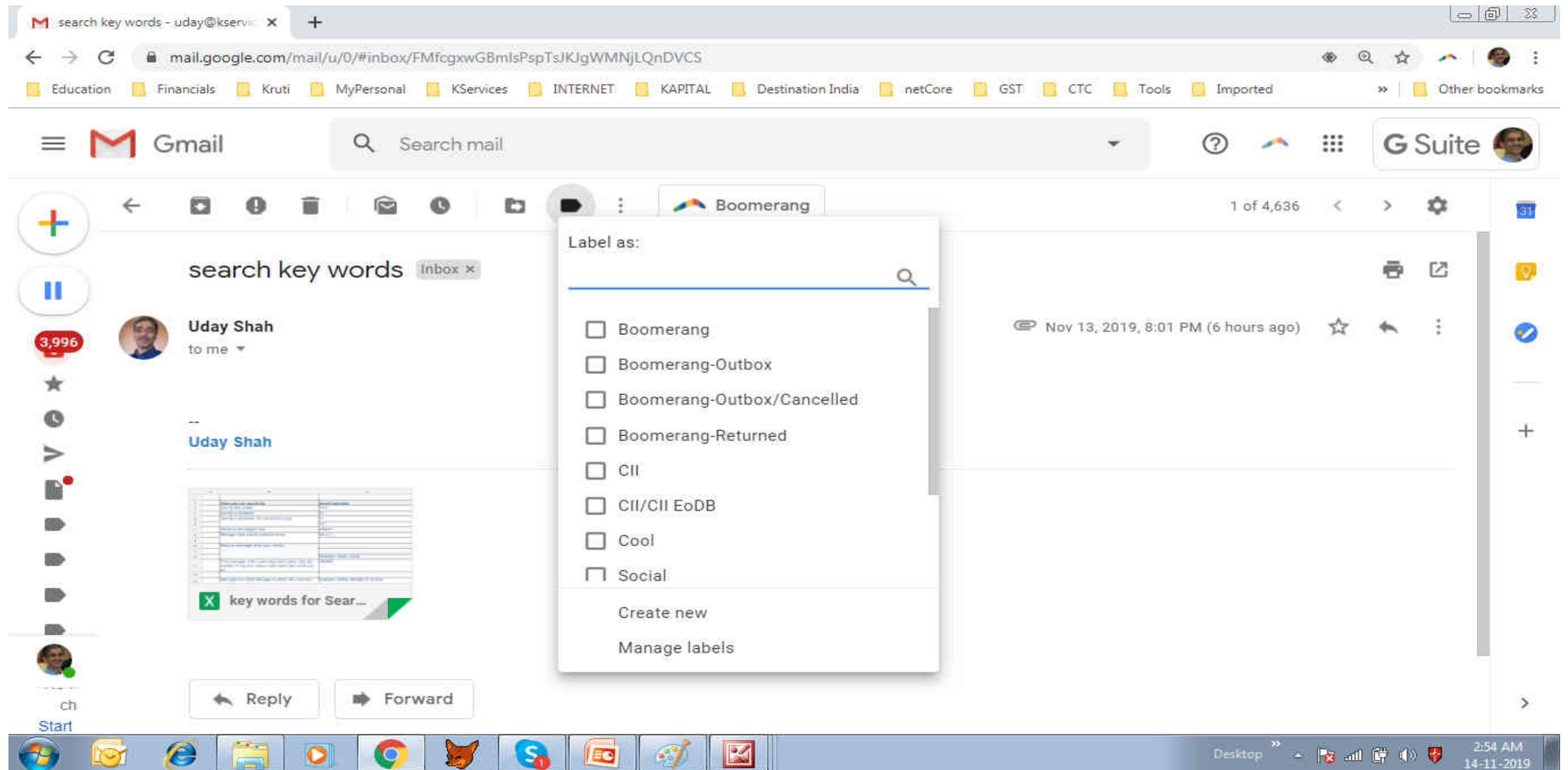
Organise



Organise



Organise



Organise

The screenshot shows the Gmail 'Labels' settings page. An orange circle highlights the 'Settings' link in the left-hand navigation menu. Another orange circle highlights the 'Settings' option in the top-right gear menu. An orange line connects these two circles, indicating the path to access settings. The main content area lists system labels with options to show or hide them in the label list. The Windows taskbar is visible at the bottom.

Settings - uday@kservices.in - Kr x +

mail.google.com/mail/u/0/#settings/labels

Education Financials Kruti MyPersonal KServices INTERNET KAPITAL Destination India netCore GST CTC Tools Imported Other bookmarks

Gmail Search mail

G Suite

Settings

General Labels Inbox Accounts Filters and Blocked Addresses Forwarding and POP/IMAP Add-ons Chat Advar

System labels Show in label list

System labels	Show in label list
Inbox	
Starred	show hide
Snoozed	show hide
Important	show hide
Chats	show hide
Sent	show hide
Scheduled	show hide show if unread
Drafts	show hide show if unread
All Mail	show hide
Spam	show hide show if unread

Display density

Configure inbox

Settings

Manage this domain

Themes

Get add-ons

Send feedback

Help

✓ Show in IMAP

✓ Show in IMAP

✓ Show in IMAP

✓ Show in IMAP

Desktop 2:56 AM 14-11-2019

Organise

The screenshot shows the Gmail 'Settings - Labels' page. The browser address bar is 'mail.google.com/mail/u/0/#settings/labels'. The left sidebar shows the 'Labels' section selected and circled in orange, with a 'Create new label' button. The main content area lists labels: Spam, Trash, Categories, and Boomerang. For each label, there are 'show' and 'hide' links for the label list and message list, and a 'show if unread' link for Spam. The 'show' links for the 'Categories' section are highlighted with orange boxes. The 'Boomerang' label's 'show', 'hide', and 'show if unread' links are also highlighted with an orange box. The 'Actions' column for Boomerang shows 'remove' and 'edit' links. The right sidebar shows the 'G Suite' logo and a calendar icon. The Windows taskbar at the bottom shows the time as 2:59 AM on 14-11-2019.

Settings - uday@kservices.in - Kr x +

mail.google.com/mail/u/0/#settings/labels

Education Financials Kruti MyPersonal KServices INTERNET KAPITAL Destination India netCore GST CTC Tools Imported Other bookmarks

Gmail Search mail ? G Suite

Settings

General Labels Inbox Accounts Filters and Blocked Addresses Forwarding and POP/IMAP Add-ons Chat Advanced Offline Themes

Spam show hide show if unread Show in IMAP

Trash show hide Show in IMAP

Categories

Categories show hide Show in label list Show in message list

Social show hide

Updates show hide

Forums show hide

Promotions show hide

Labels

Create new label

Boomerang show hide show if unread Show in label list Show in message list Actions remove edit Show in IMAP

ch Start

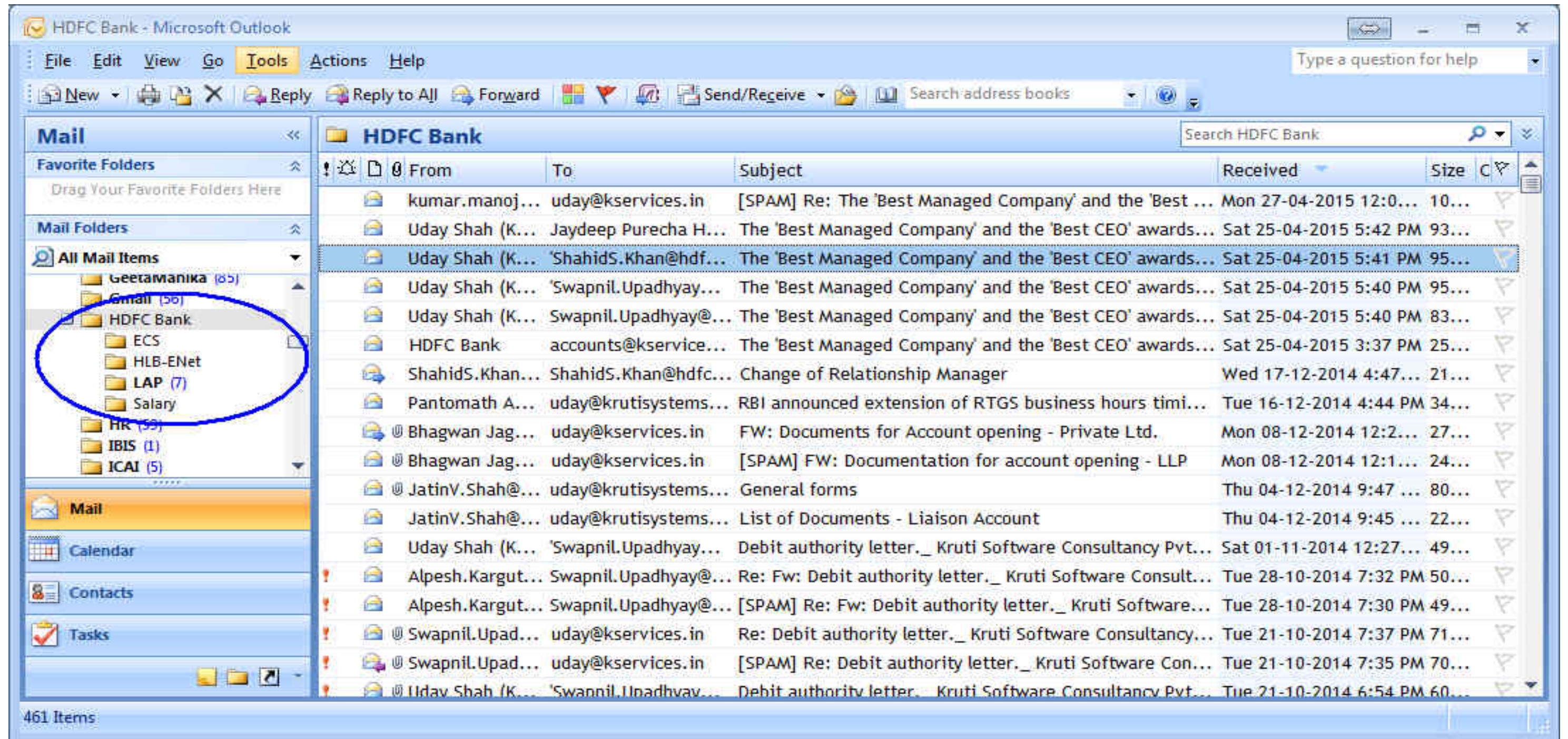
Desktop 2:59 AM 14-11-2019

Organise

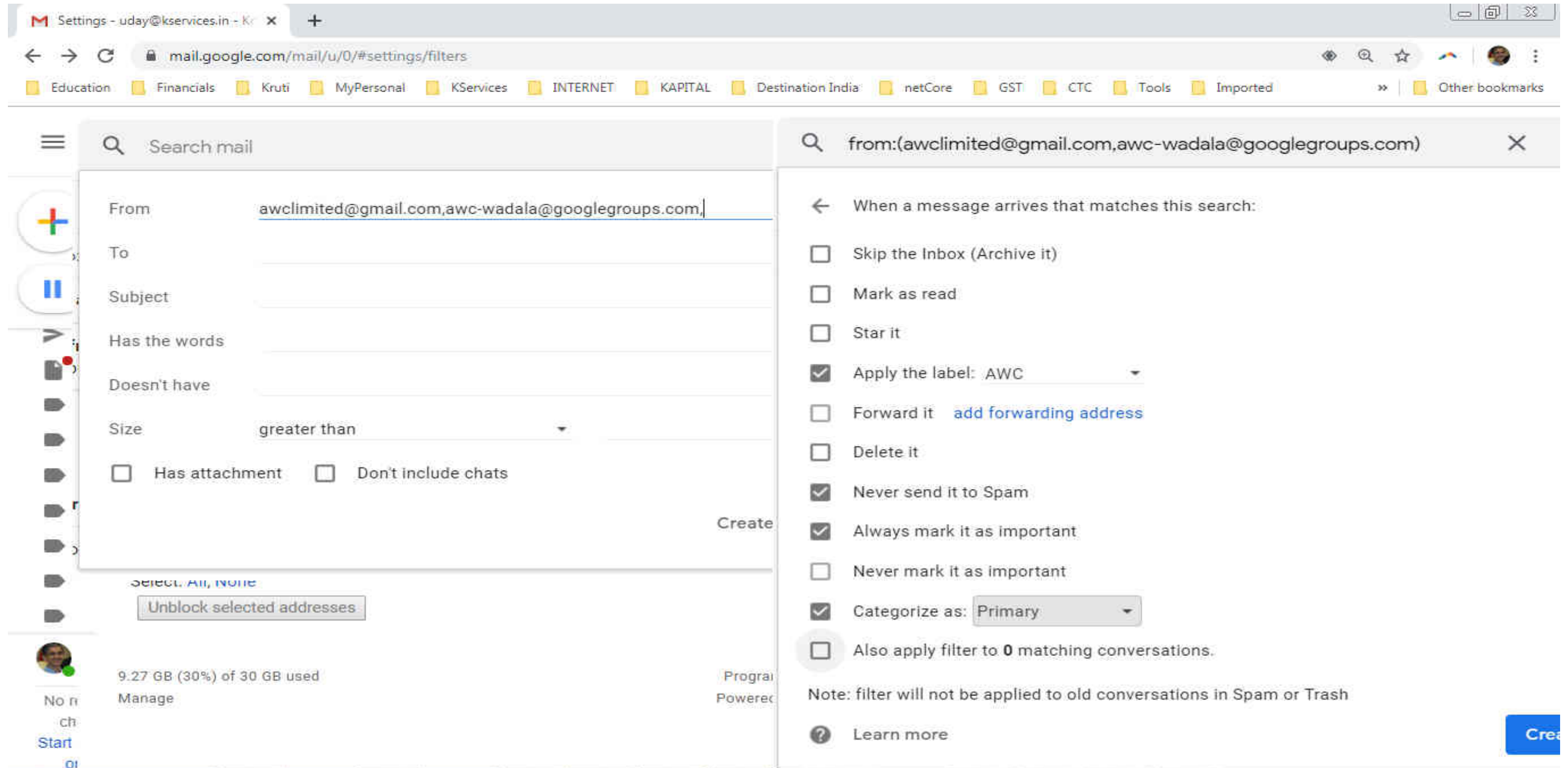
The screenshot shows the Gmail 'Labels' settings page for the account 'uday@ksservices.in'. The left sidebar lists labels: 'Compose', 'Pause Inbox', 'Drafts', 'Boomerang', 'Boomerang-Outbox', 'Boomerang-Returned', 'CII' (highlighted with an orange box), 'CII EoDB' (highlighted with an orange box), 'Cool', and 'More'. A black text box with white text 'Nested Label/ Sub Folders' is overlaid on the 'CII' and 'CII EoDB' labels. The main content area shows a table of labels with columns for 'show', 'hide', 'show if unread', 'remove', 'edit', and 'Show in IMAP'. The table lists several labels, including 'CII' and 'CII EoDB'. A note at the bottom states: 'Note: Removing a label will not remove the messages with that label.'

Label	show	hide	show if unread	remove	edit	Show in IMAP
CII	show	hide	show if unread	remove	edit	<input checked="" type="checkbox"/>
CII EoDB	show	hide	show if unread	remove	edit	<input checked="" type="checkbox"/>
Cool	show	hide	show if unread	remove	edit	<input checked="" type="checkbox"/>
More	show	hide	show if unread	remove	edit	<input checked="" type="checkbox"/>

Organise using folders



Organise using Filter



The screenshot shows the Gmail 'Settings - Filters' page in a web browser. The browser's address bar displays 'mail.google.com/mail/u/0/#settings/filters'. The top navigation bar includes various filters like 'Education', 'Financials', 'Krutti', 'MyPersonal', 'KServices', 'INTERNET', 'KAPITAL', 'Destination India', 'netCore', 'GST', 'CTC', 'Tools', and 'Imported'. The left sidebar shows the Gmail interface with a search bar and a list of filters. The main content area is titled 'from:(awclimited@gmail.com,awc-wadala@googlegroups.com)'. It contains a list of filter rules with checkboxes for actions like 'Skip the Inbox (Archive it)', 'Mark as read', 'Star it', 'Apply the label: AWC', 'Forward it', 'Delete it', 'Never send it to Spam', 'Always mark it as important', 'Never mark it as important', 'Categorize as: Primary', and 'Also apply filter to 0 matching conversations'. A 'Create' button is visible at the bottom right.

Settings - uday@kservices.in - Kruti

mail.google.com/mail/u/0/#settings/filters

Education Financials Kruti MyPersonal KServices INTERNET KAPITAL Destination India netCore GST CTC Tools Imported Other bookmarks

Search mail

From: awclimited@gmail.com,awc-wadala@googlegroups.com

To:

Subject:

Has the words:

Doesn't have:

Size: greater than

☐ Has attachment ☐ Don't include chats

Create

select: All, None

Unblock selected addresses

9.27 GB (30%) of 30 GB used

No ri

ch

Start

or

Program

Powered

from:(awclimited@gmail.com,awc-wadala@googlegroups.com)

When a message arrives that matches this search:

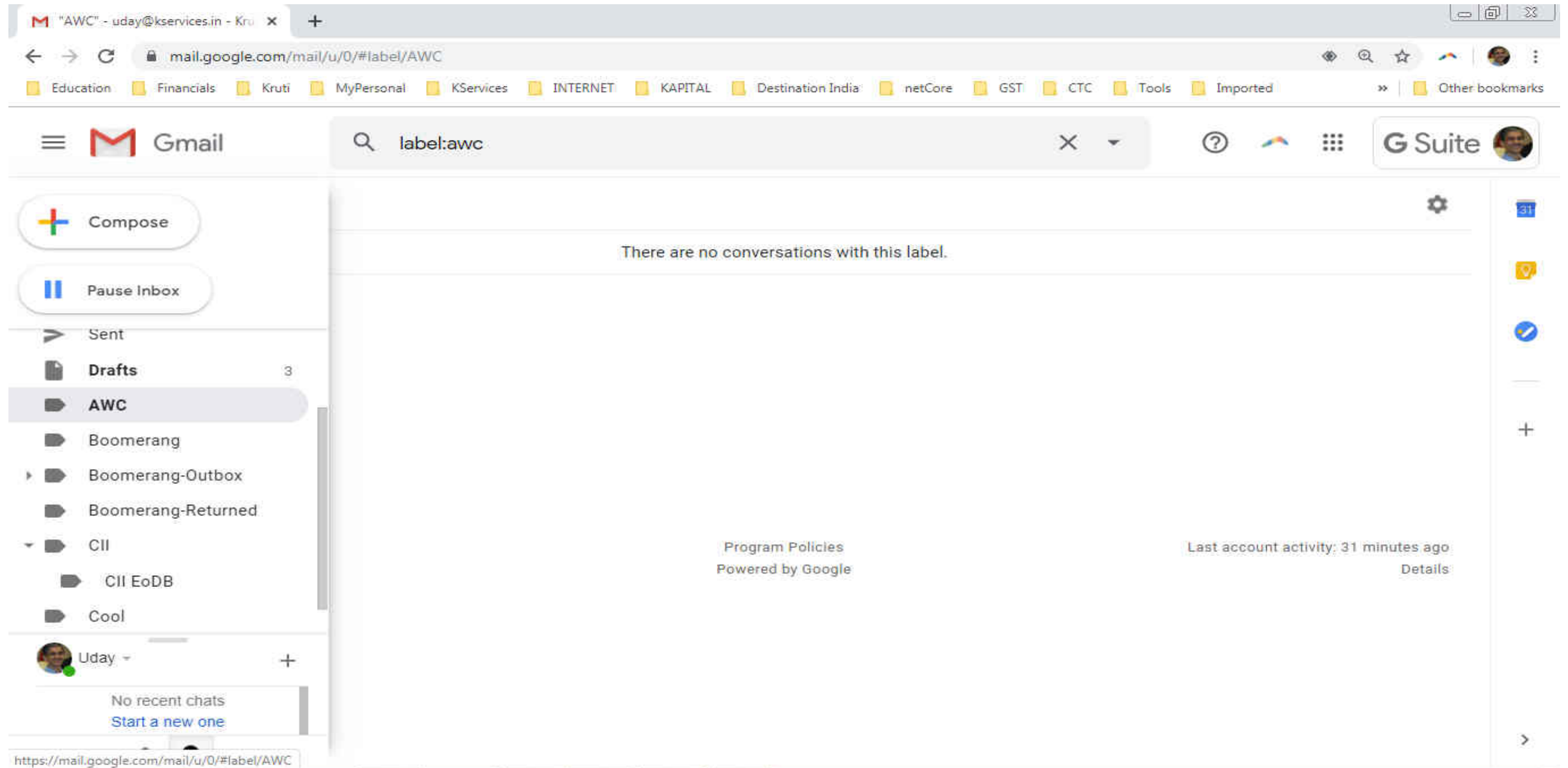
- ☐ Skip the Inbox (Archive it)
- ☐ Mark as read
- ☐ Star it
- ☒ Apply the label: AWC
- ☐ Forward it [add forwarding address](#)
- ☐ Delete it
- ☒ Never send it to Spam
- ☒ Always mark it as important
- ☐ Never mark it as important
- ☒ Categorize as: Primary
- ☐ Also apply filter to 0 matching conversations.

Note: filter will not be applied to old conversations in Spam or Trash

? Learn more

Create

Organise using Filter



- Organise using *Colours*,
 - Colour code on basis of “From - Sender”
 - Colour code on basis of “To - Receiver”
- Organise in *Folders and sub-folders*

Organise using Colours

The screenshot displays the Microsoft Outlook interface. On the left, the 'Ways to Organize Inbox' pane is visible, with 'Using Colors' selected. The main inbox area shows a list of emails. An 'Automatic Formatting' dialog box is open on the right, showing rules for the current view. The rule 'Mail sent to uday@krutisystems.com' is selected, and its properties are being configured.

Ways to Organize Inbox

- Color messages sent to **uday@krutisystems.com** in **Blue** [Apply Color] Done!
- Show messages sent **only to me** in **Navy** [Turn on]

To view or edit your coloring, and for more advanced options, click on "Automatic Formatting" above.

Inbox

	From	Subject
Date: Older		
	CCC - ICAI	Invitation for empanelment as Resource Persons for the Co
	The Economic ...	Cairn India to merge into Vedanta and other ET stories
	CCC - ICAI	Invitation for empanelment as Resource Persons for the Co
	noreply@vod...	The all new My Vodafone App!
	ICICI Bank	Instant Personal Loans @ 13%. Apply Now !
	Gautam Agrawal	WORKSHOP ON ADVANCE BUSINESS WRITING
	SBI Cards	Introducing New SimplySAVE SBI Card. Enjoy More Save More - #14
	Amazon Future...	Invitation to an Amazon Future@Good Membership

Automatic Formatting

Rules for this view:

- ☒ Unread messages
- ☒ Unread group headers
- ☒ Submitted but not sent
- ☒ Expired e-mail
- ☒ Overdue e-mail
- ☒ Mail sent to uday@ksservices.in
- ☒ Mail sent to uday@krutisystems.com
- ☒ Mail received from ICAI

Properties of selected rule

Name: Mail sent to uday@krutisystems.com

Font: 10 pt. Comic Sans MS

Condition: ...

[OK] [Cancel]

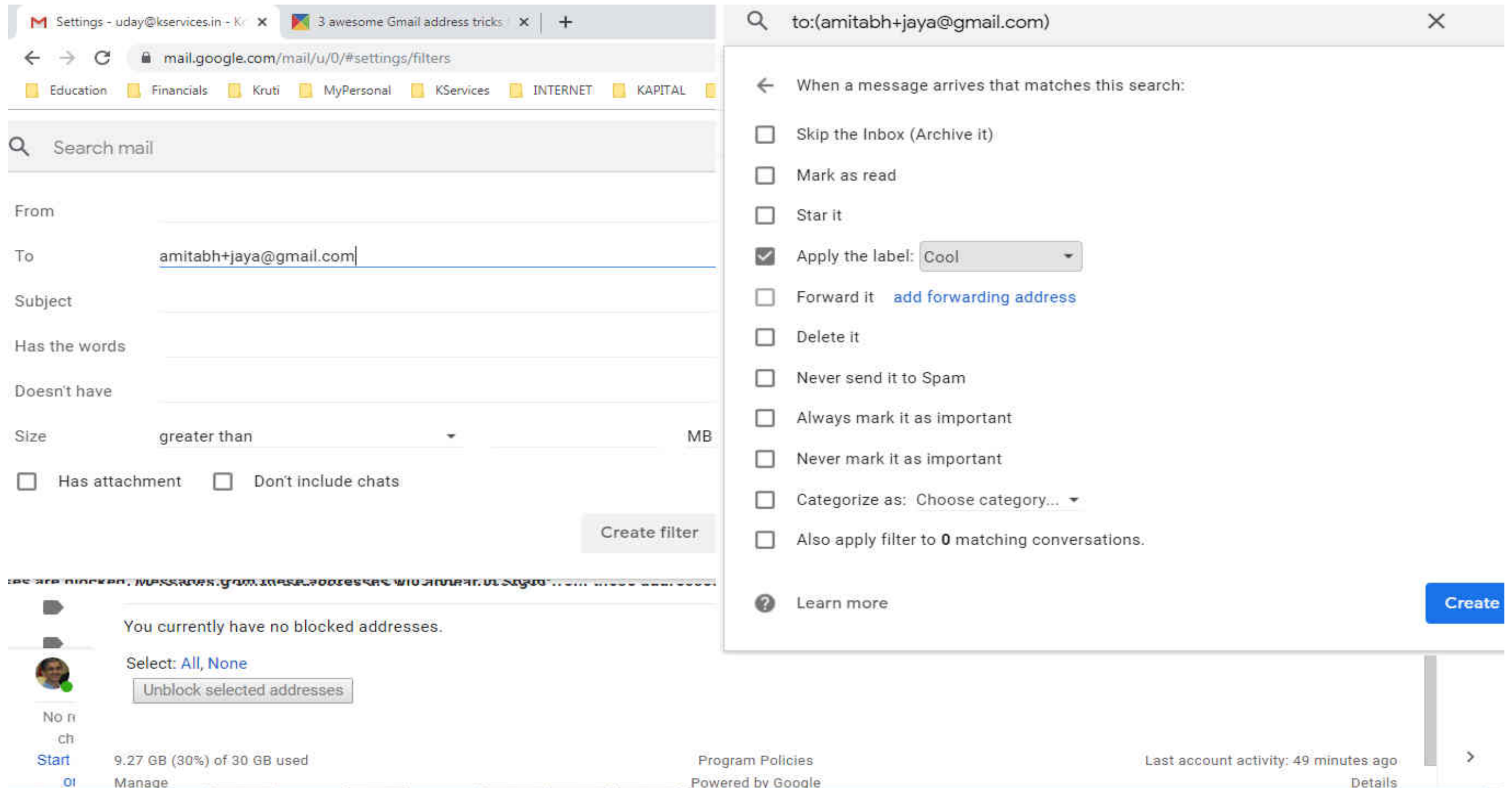
- *Plus+* address to automate Label (Gmail.com users ONLY)

amitabh@gmail.com

amitabh+jaya@gmail.com

- Email account being amitabh@gmail.com, all emails to amitabh+jaya@gmail.com can be auto-labeled to family, forwarded to another account and or marked for future

Organise



The screenshot shows the Gmail 'Create filter' dialog box. The search criteria on the left include: 'To' set to 'amitabh+jaya@gmail.com', 'Size' set to 'greater than' MB, and checkboxes for 'Has attachment' and 'Don't include chats'. The 'Create filter' button is at the bottom right of the criteria section. The filter actions on the right include: 'Skip the Inbox (Archive it)', 'Mark as read', 'Star it', 'Apply the label: Cool' (checked), 'Forward it' (with a link to 'add forwarding address'), 'Delete it', 'Never send it to Spam', 'Always mark it as important', 'Never mark it as important', 'Categorize as: Choose category...', and 'Also apply filter to 0 matching conversations'. A 'Learn more' link and a 'Create' button are at the bottom right of the actions section. The background shows the Gmail settings page with a search bar, tabs for different categories, and a list of blocked addresses.

Settings - uday@ksservices.in - Kr x 3 awesome Gmail address tricks x +

mail.google.com/mail/u/0/#settings/filters

Education Financials Kruti MyPersonal KServices INTERNET KAPITAL

Search mail

From

To amitabh+jaya@gmail.com

Subject

Has the words

Doesn't have

Size greater than MB

☐ Has attachment ☐ Don't include chats

Create filter

When a message arrives that matches this search:

- ☐ Skip the Inbox (Archive it)
- ☐ Mark as read
- ☐ Star it
- ☒ Apply the label: Cool
- ☐ 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...
- ☐ Also apply filter to 0 matching conversations.

[Learn more](#) [Create](#)

You currently have no blocked addresses.

Select: All, None

[Unblock selected addresses](#)

No n ch

Start 9.27 GB (30%) of 30 GB used

Program Policies Powered by Google

Last account activity: 49 minutes ago

Details

Flag for Follow-up

The screenshot shows a Gmail inbox with an email from **Enetadvicemailing@hdfcbank.net** titled "EmailAdvices for NEFT; Payment refere". The email content includes "Dear Sir/Madam," and "This is to inform you that a transfer of Rs. 14000through NEFT ha". A Boomerang popup is open over the email, titled "Return Conversation to Inbox...". It offers options to schedule a follow-up: "if no reply" (checked) or "with a note" (unchecked). Timing options include "In 1 hour", "In 2 hours", "In 4 hours", "Tomorrow morning", "Tomorrow afternoon", "In 2 days", "In 4 days", "In 1 week", "In 2 weeks", and "In 1 month". There is also an option "At a specific time:" with examples "Monday 9am" and "Dec 23". A date and time picker shows "11/16/2019 8:00 AM" and a "Confirm" button.

- 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 and Alerts

Rules Wizard

Start from a template or from a blank rule

Step 1: Select a template

Stay Organized

- Move messages from someone to a folder
- Move messages with specific words in the subject to a folder
- Move messages sent to a distribution list to a folder
- Delete a conversation
- Flag messages from someone for follow-up
- Move Microsoft Office InfoPath forms of a specific type to a folder
- Move RSS items from a specific RSS Feed to a folder

Stay Up to Date

- Display mail from someone in the New Item Alert Window
- Play a sound when I get messages from someone
- Send an alert to my mobile device when I get messages from someone

Start from a blank rule

- Check messages when they arrive
- Check messages after sending

Step 2: Edit the rule description (click 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

Cancel < Back Next > Finish

Rules Wizard

Finish rule setup.

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"

☒ Turn on this rule

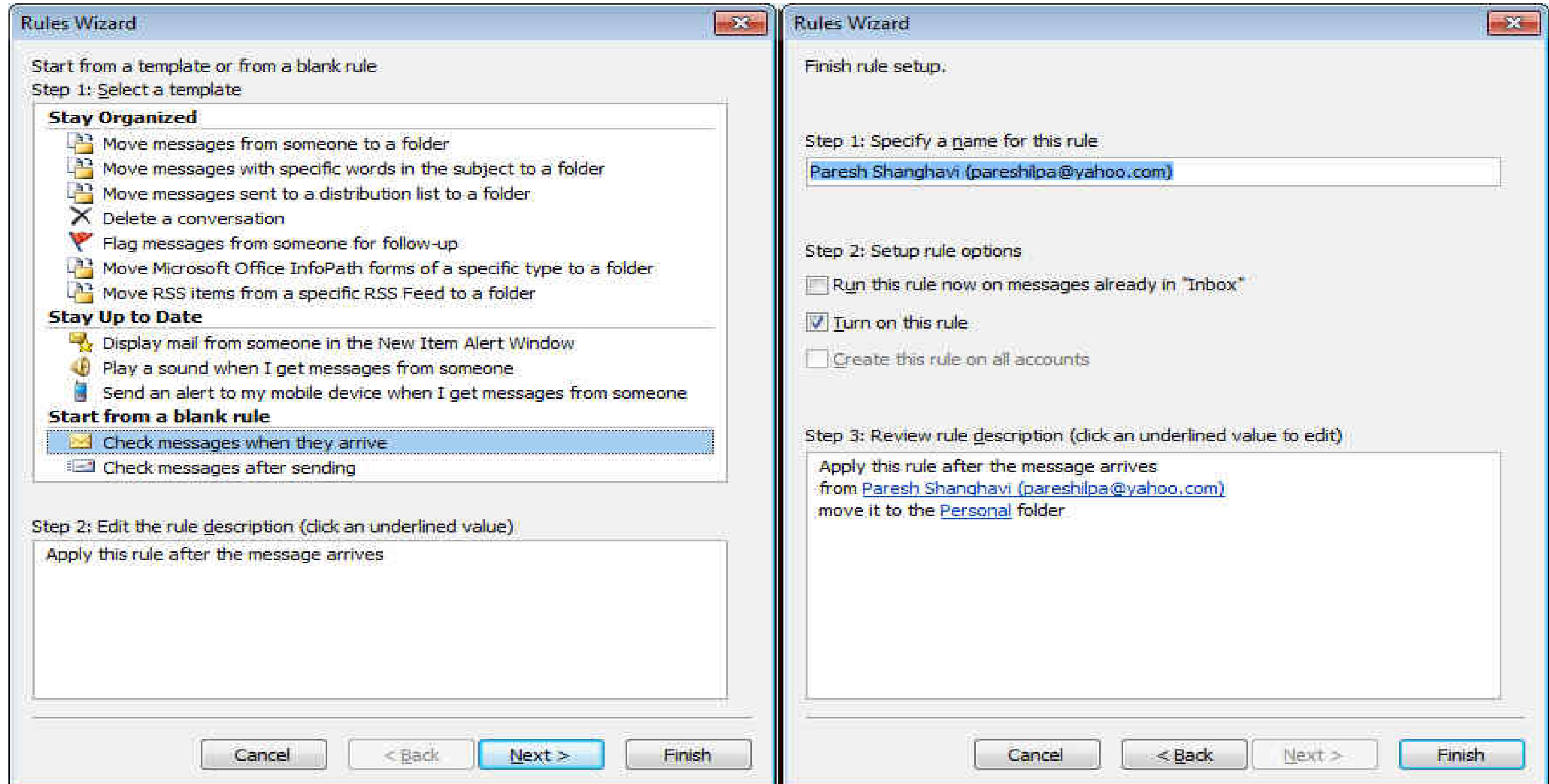
☐ Create this rule on all accounts

Step 3: Review rule description (click an underlined value to edit)

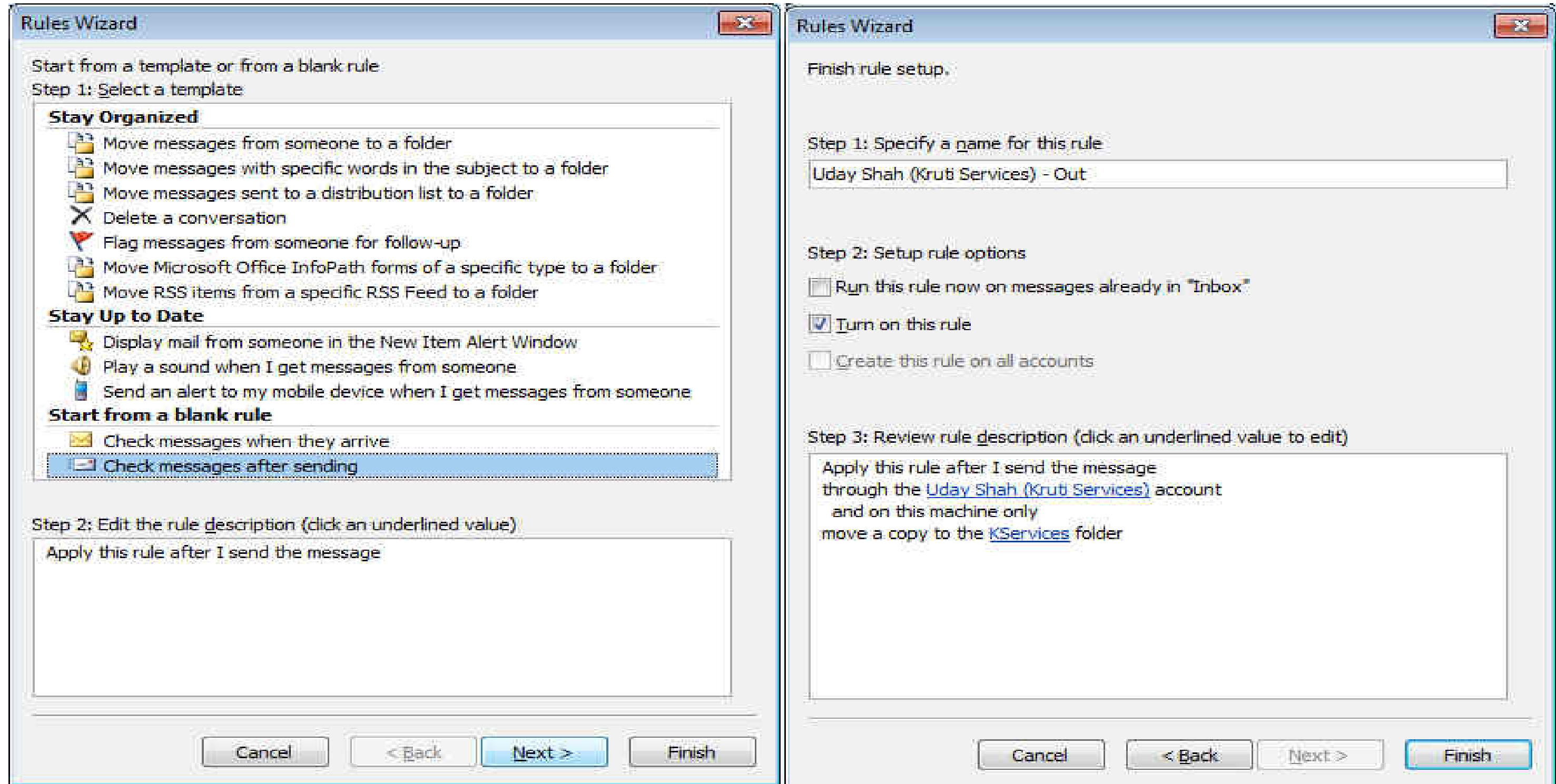
Apply this rule after the message arrives
from Parimal M Parikh (parimal@parimalparikh.com)
display PMP in the New Item Alert window

Cancel < Back Next > Finish

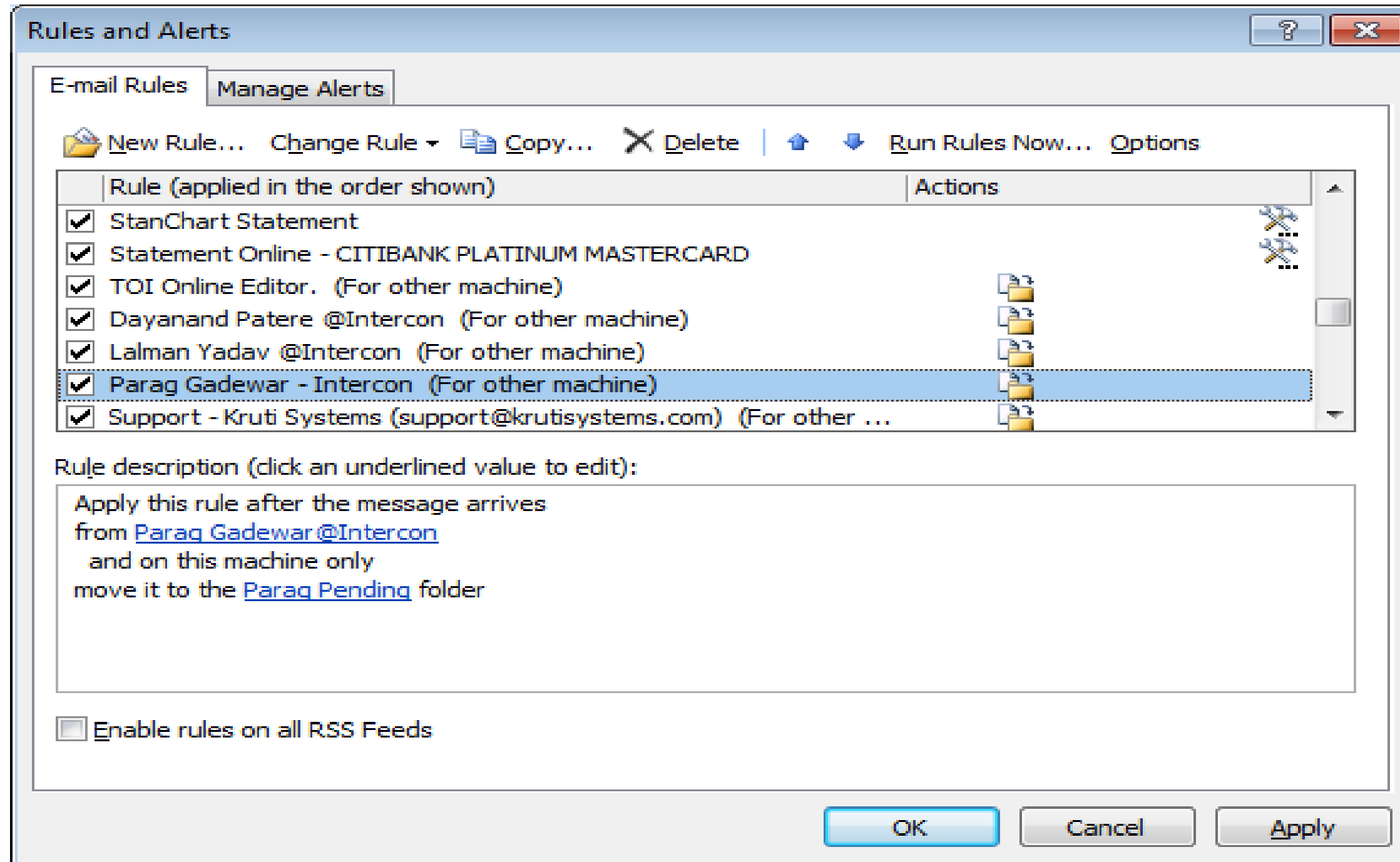
Rules and Alerts



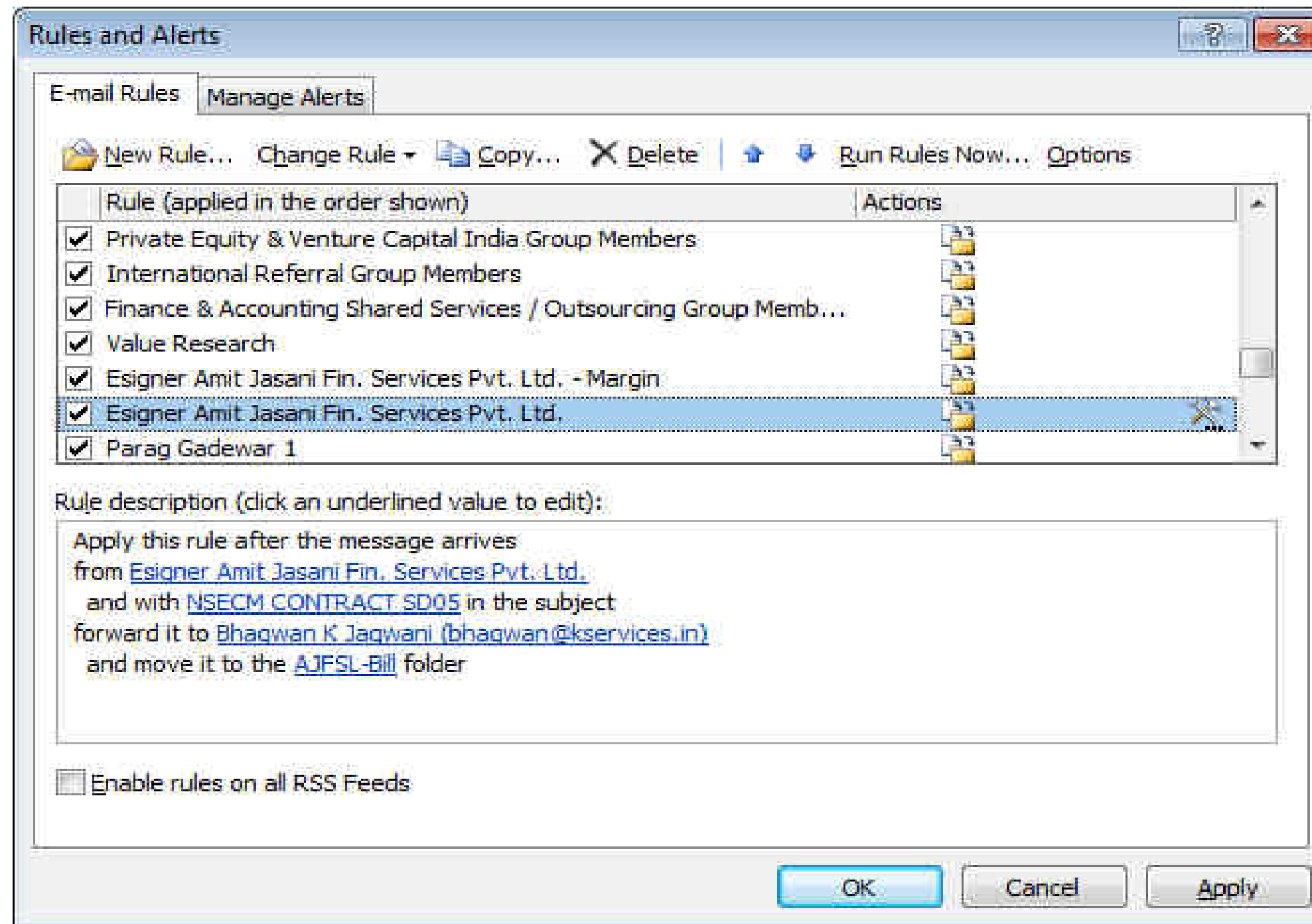
Rules and Alerts



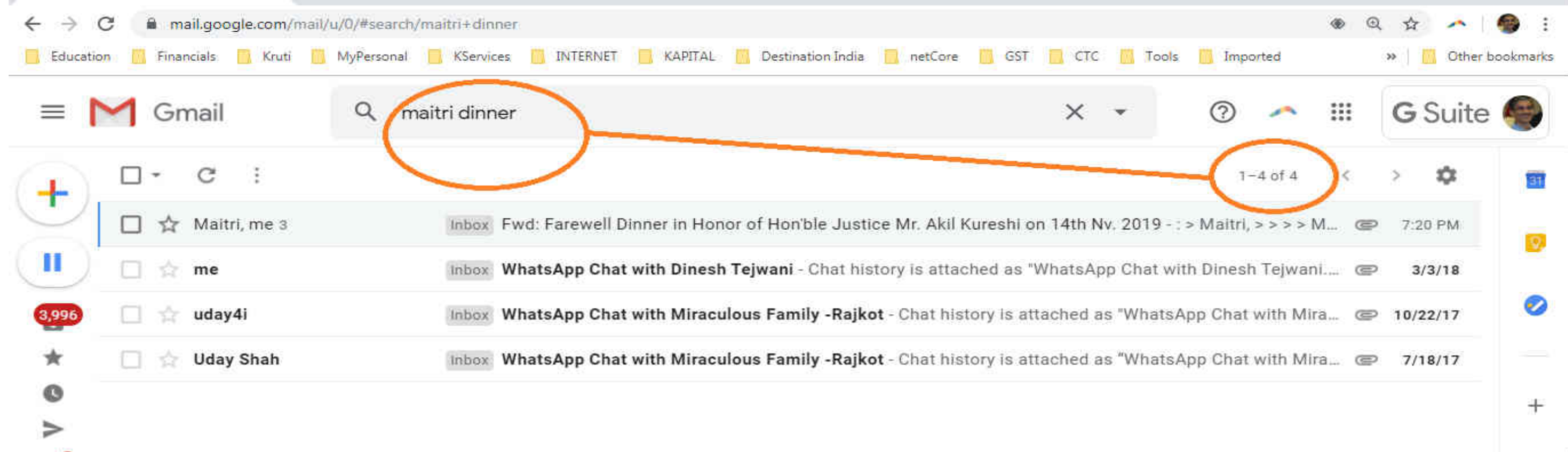
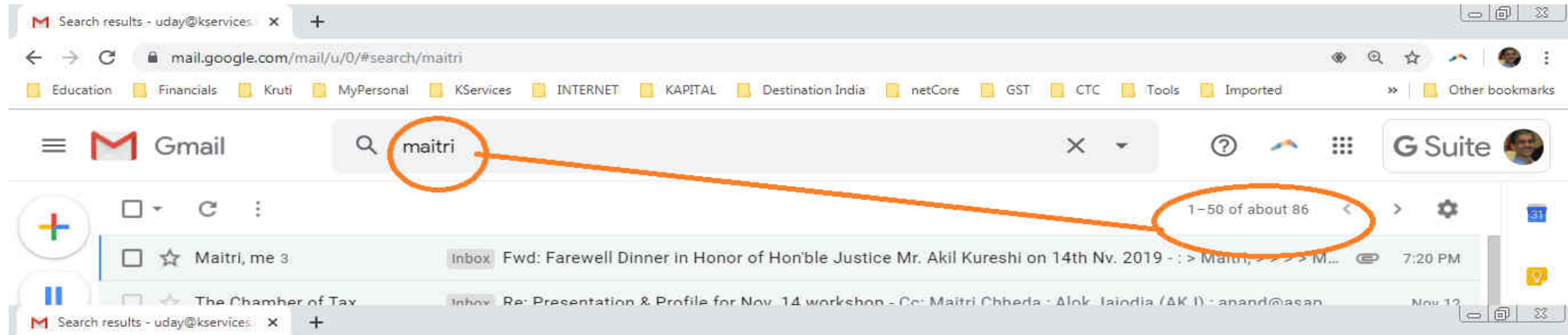
Rules and Alerts



Rules and Alerts



- Random Search
- Advance Search
- Key words based Search



Advance Search

The image shows a Gmail interface with an advanced search overlay. The search query is "maitri dinner". The filters applied are:

- From: dktejwani@gmail.com
- Has the words: maitri dinner
- Doesn't have: (empty)
- Size: greater than MB
- Date within: 1 day
- Search: All Mail
- ☒ Has attachment
- ☐ Don't include chats

The search results on the right show 1-4 of 4 results, with the first result being from "M..." at 7:20 PM. The bottom of the image shows the search bar with the query "from:(dktejwani@gmail.com) maitri dinner has:attachment" circled in orange.

Key words based Search

What you can search by	Search operator	Example
Sender	from:	from:ctconline
Recipient	to:	to:office
Copy to - cc	cc:	cc: suresh
Blind Copy to - bcc	bcc:	bcc: ramesh
Subject line - part or full	subject:	subject:dinner
Messages that match multiple terms	OR or { }	from:office OR from:suresh {from:office from:suresh}
Does not contain - Removes messages	- (minus)	dinner -movie contains Dinner but does not include movie
Messages with words near each other. Specify the number to say how many words apart the specified words can be.	AROUND (caps)	holiday AROUND 10 vacation
If you add Quotes, then order of words will be maintained in search		"holiday AROUND 10 vacation"
Label	label:	label:CTC
HAS - Messages with Attachment, Google Drive, Docs, Sheets, or Slides attachment or link	has:	has:attachment
		has:drive
		has:document
		has:spreadsheet
		has:presentation
		has:drive
		has:youtube
		has:youtube

Actions: Help

Type a question for help

Reply to All Forward Send/Receive Search address books

Inbox (Search Results) Gautam

From	Subject	Received	Categ...
Gautam Agrawal	WORKSHOP ON ADVANCE BUSINESS WRITING	Sun 14-06-2015 1:49 PM	
CA Vijay Goel	RE: URGENT - IFA India Branch Accounts FY 2013-14	Sat 06-06-2015 1:42 PM	
Gaurav Kapoor	[SPAM] Seminar on How To Provide Exceptional Customer Service	Sat 06-06-2015 3:35 AM	
Craig Adams	Re: Kruti Systems	Mon 18-05-2015 2:28 AM	
Mahesh Gadha...	IFA : Payable to IFA NL - MEMBERSHIP 2015	Fri 15-05-2015 1:18 PM	
Mahesh Gadhavi	IFA : SERVICE TAX WORKING FOR JANUARY 15 to APRIL 15	Fri 15-05-2015 1:10 PM	
Facebook	Jatin Lodaya updated his status: "One of the best time lapses on..."	Wed 13-05-2015 9:47 PM	
IFA INDIA	Updated list of membership fees received for 2015 at IFA WRC Office [GroupMail]	Tue 12-05-2015 1:19 PM	
IFA INDIA	Updated list of membership fees received for 2015 at IFA WRC Office	Tue 12-05-2015 1:18 PM	
IFA INDIA	Update on - Membership fees received - at IFA WRC Mumbai office - 02.05.15	Sat 02-05-2015 3:40 PM	
IFA INDIA	Update on - Membership fees received - at IFA WRC Mumbai office - 02.05.15	Sat 02-05-2015 3:39 PM	
Sushil Lakhani	FW: Outstanding Membership Fees Report for 2014 and 2013 on...	Tue 21-04-2015 3:38 PM	
Sushil Lakhani	FW: Outstanding Membership Fees Report for 2014 and 2013 on...	Mon 20-04-2015 1:26 PM	
Uday Shah	Outstanding Membership Fees Report for 2014 and 2013 on 18-04-2015	Sat 18-04-2015 5:42 AM	
Uday Shah	Outstanding Membership Fees Report for 2014 and 2013 on 18-04-2015	Sat 18-04-2015 5:23 AM	

Advance Search

The image displays two side-by-side screenshots of the Outlook 'Advanced Find' dialog box, illustrating the search process.

Left Screenshot: Search Criteria Setup

The 'Look for:' dropdown is set to 'Messages'. The 'In:' field is set to 'Inbox;Education;ICAI'. The 'Search for the word(s):' field contains 'Fees'. The 'In:' dropdown for the search term is set to 'frequently-used text fields'. The 'Where I am:' dropdown is set to 'the only person on the To line'. The 'Time' dropdown is set to 'none'. The 'Find Now' button is highlighted.

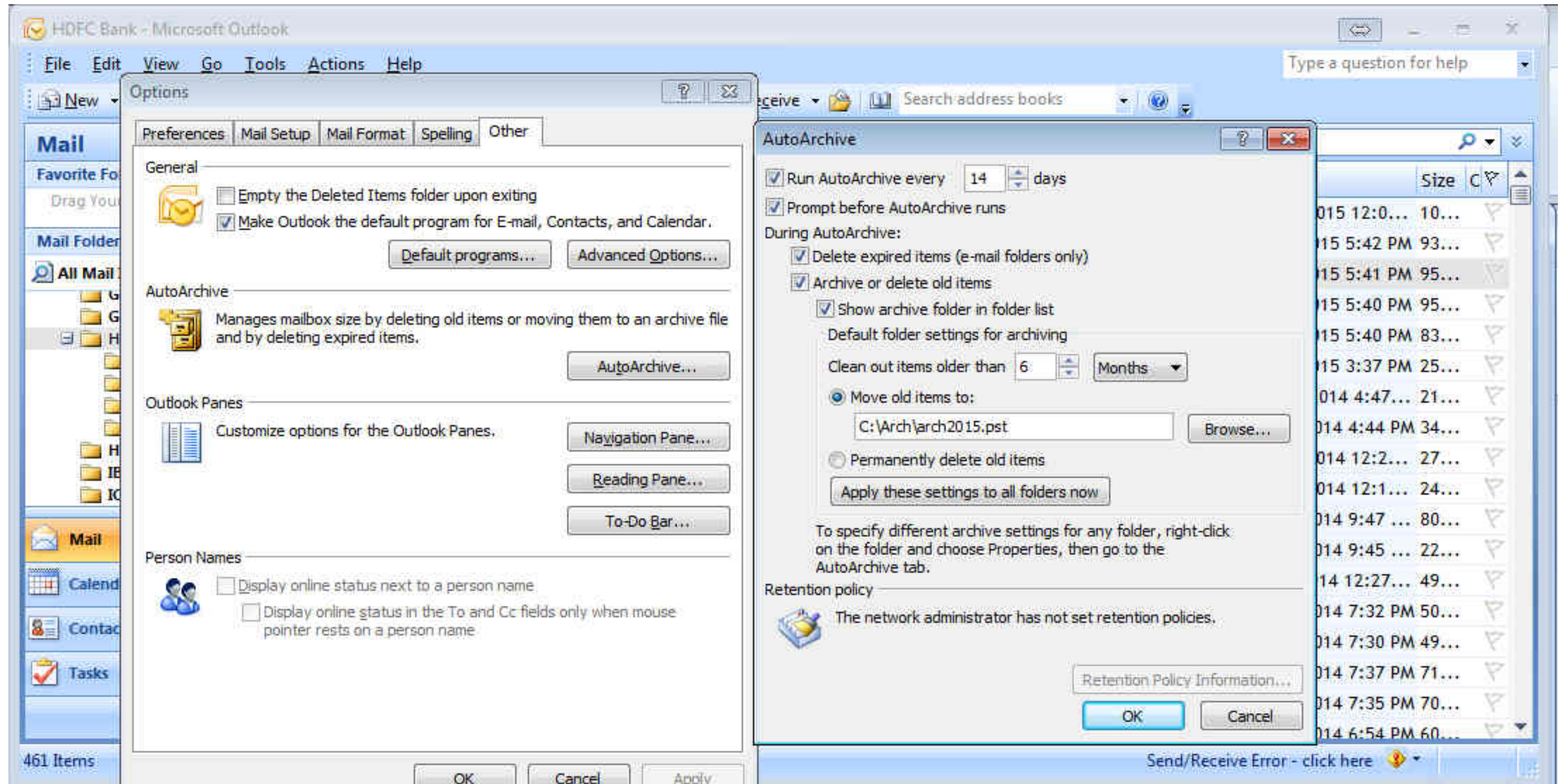
Right Screenshot: Search Results

The 'Find items that match these criteria:' section shows the search results. The criteria are: 'Received last month' and 'From contains @hdfcbank.com'. The 'Remove' button is visible. The 'Define more criteria:' section is empty. The 'Add to List' button is visible. The 'More Advanced...' button is also present.

Search Results Table:

From	Subject	Recei...	Si...	Categ...	In Folder
Gau...	WORKSHOP ON ADVANCE BU...	Sun 1...	9...		Inbox
HDF...	Email Statement of your HDFC ...	Sun 1...	1...		Inbox
HDF...	Email Statement of your HDFC ...	Sun 1...	1...		Inbox
HDF...	Email Statement of your HDFC ...	Sun 1...	1...		Inbox
HDF...	Email Statement of your HDFC ...	Sun 1...	1...		Inbox
Citi ...	Shop for Your ♥ Ones & Get 2...	Sun 1...	5...		Inbox
CE...	Certificate Course on Derivatives	Sat 1...	1...		Inbox

285 Items



Search results - uday@ksservices x +

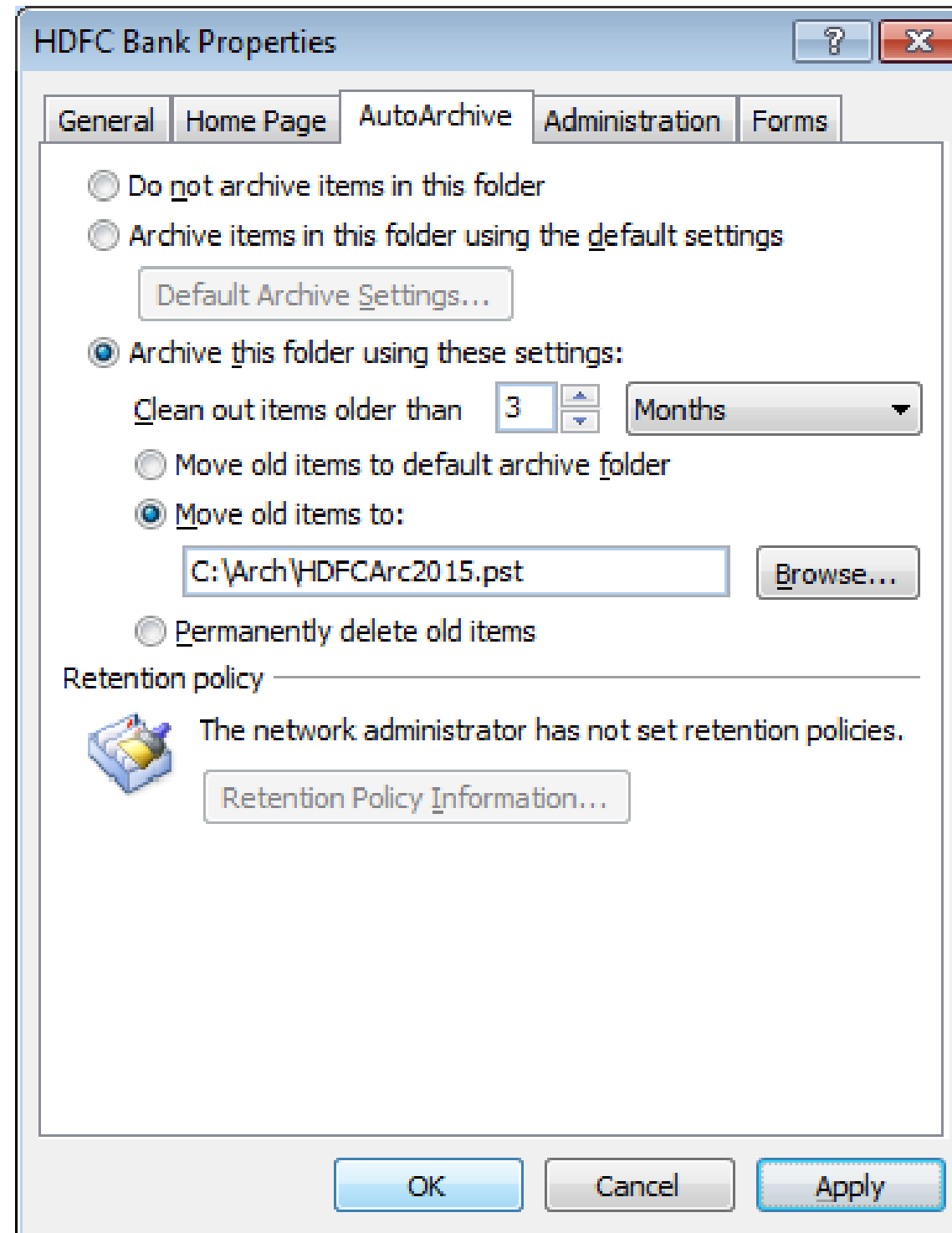
mail.google.com/mail/u/0/#advanced-search/subset=all&within=1d&sizeoperator=s_sl&sizeunit=s_smb

Education Financials Kruti MyPersonal KServices INTERNET KAPITAL Destination India netCore GST CTC Tools Imported Other bookmarks

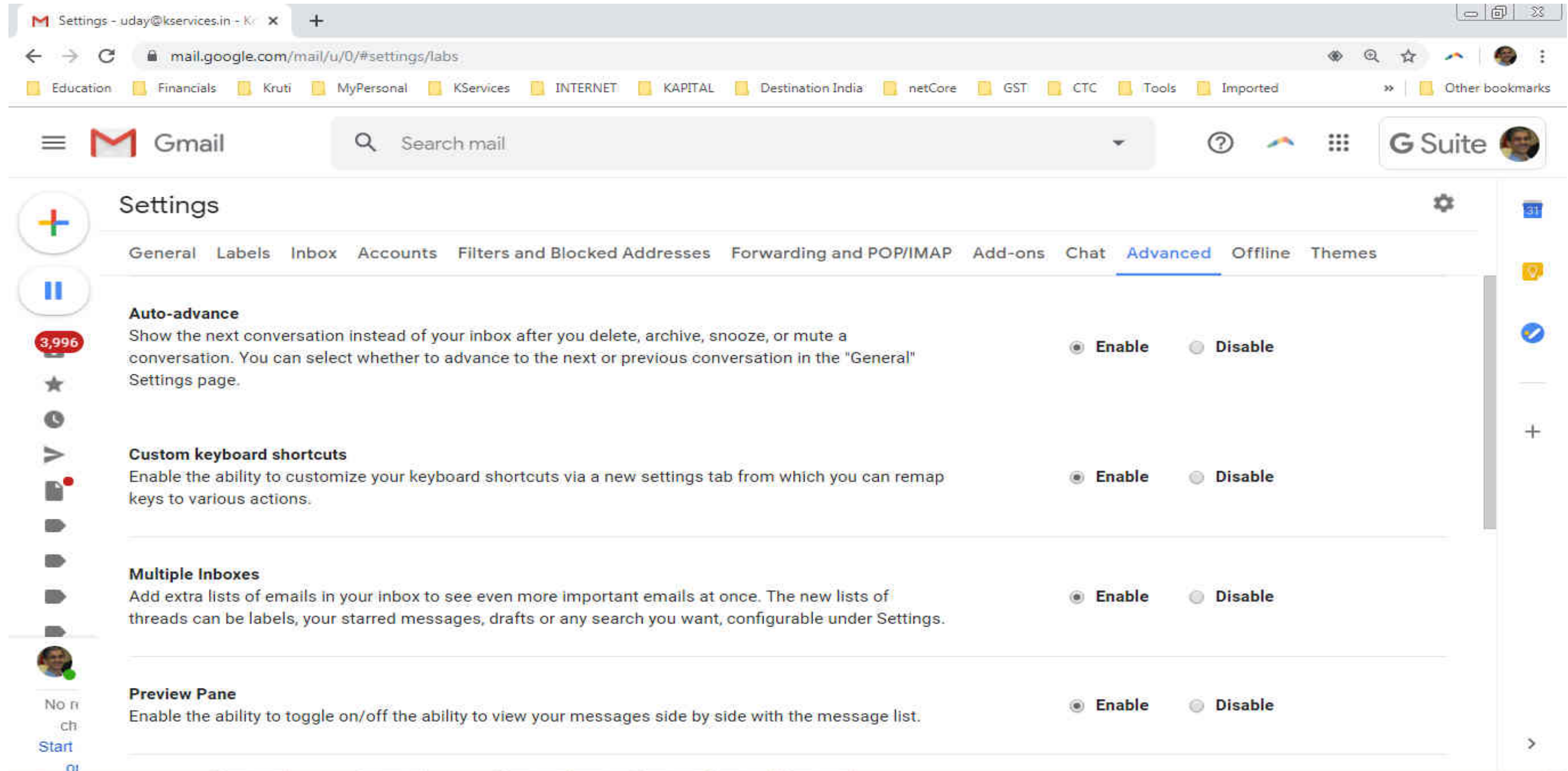
Gmail Search mail

Boomerang 1-50 of 13,326

Check	Star	From	Inbox	Subject	Time
<input checked="" type="checkbox"/>	☆	Accountancy Age Res.	Inbox	{Spam?} How to optimise your compliance lifecycle - >> Forward to a Friend www.accountancyage.co...	8:36 PM
<input type="checkbox"/>	☆	Uday Shah	Inbox	search key words --- Uday Shah	8:01 PM
<input type="checkbox"/>	☆	Maitri, me 3	Inbox	Fwd: Farewell Dinner in Honor of Hon'ble Justice Mr. Akil Kureshi on 14th Nv. 2019 - In your words, NOo...	7:20 PM
<input type="checkbox"/>	☆	Français à l'étrang.	Inbox	{Spam?} Français à l'étranger - Newsletter quotidienne - Toutes nos dernières actualités Le journal des...	5:27 PM
<input type="checkbox"/>	☆	Enetadvicemailing	Inbox	EmailAdvices for NEFT; Payment reference no. - FT911136394407 - Dear Sir/Madam, This is to inform ...	5:19 PM
<input type="checkbox"/>	☆	Inc42 Media	Inbox	{Spam?} Niki Close To \$30 Mn Fundraise, Sunstone Eduversity Completes Seed Round & More - What ...	4:35 PM
<input type="checkbox"/>	☆	Accountancy Age Res.	Inbox	{Spam?} Your Guide to Corporate Spending in 2019 - Caxton's exclusive analysis of corporate expense ...	Nov 13
<input type="checkbox"/>	☆	CTC	Inbox	Office Productivity : Technology Tools and Tips- 14th November, 2019 - Office Productivity: Technolog...	Nov 13
<input type="checkbox"/>	☆	Contact EUC		Monthly Economic & Commercial Report - Malta - Dear Member, Greetings from EU Chambers! Please find enclo...	8:00 AM
<input type="checkbox"/>	☆	XUV300	Inbox	{Spam?} shift to an effortless and thrilling drive. - Hello, Set the roads on fire with the new Xuv300. kn...	Nov 13
<input type="checkbox"/>	☆	Bhagwan Jagwani		APM details - Ainsley Downer Ainsley.Downer@maersk.com Aasim.Khan@maersk.com	8:00 AM
<input type="checkbox"/>	☆	Sachin, Bhagwan 4	Inbox	Invoice: Professional Fees - Dear Sir, Please find attached updated invoices of KSCPL and Intercon Tha...	Nov 13



Advance Settings



The screenshot shows the Gmail 'Settings' page for the account 'uday@ksservices.in'. The 'Advanced' tab is selected, showing four settings: 'Auto-advance', 'Custom keyboard shortcuts', 'Multiple Inboxes', and 'Preview Pane'. Each setting has an 'Enable' or 'Disable' toggle. The 'Auto-advance' setting is currently enabled. The 'Custom keyboard shortcuts' setting is also enabled. The 'Multiple Inboxes' setting is disabled. The 'Preview Pane' setting is enabled. The left sidebar shows the 'Settings' menu with a plus icon, a pause icon, and a red badge with the number '3,996'. The right sidebar shows the 'G Suite' logo and a user profile picture.

Settings - uday@ksservices.in - Kr x +

mail.google.com/mail/u/0/#settings/labs

Education Financials Kruti MyPersonal KServices INTERNET KAPITAL Destination India netCore GST CTC Tools Imported Other bookmarks

Gmail Search mail ? G Suite

Settings

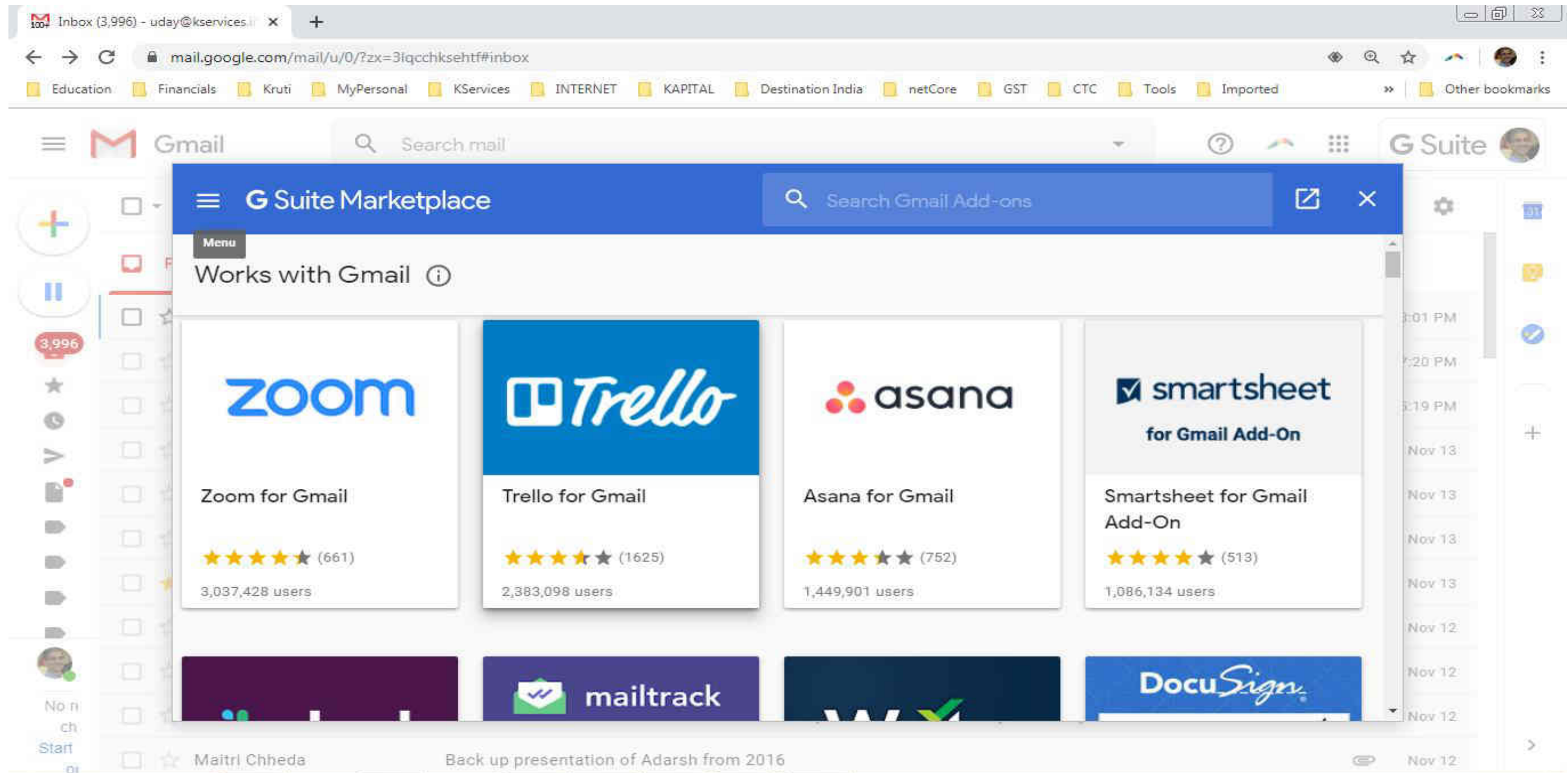
General Labels Inbox Accounts Filters and Blocked Addresses Forwarding and POP/IMAP Add-ons Chat **Advanced** Offline Themes

Auto-advance
Show the next conversation instead of your inbox after you delete, archive, snooze, or mute a conversation. You can select whether to advance to the next or previous conversation in the "General" Settings page. ☒ **Enable** ☐ **Disable**

Custom keyboard shortcuts
Enable the ability to customize your keyboard shortcuts via a new settings tab from which you can remap keys to various actions. ☒ **Enable** ☐ **Disable**

Multiple Inboxes
Add extra lists of emails in your inbox to see even more important emails at once. The new lists of threads can be labels, your starred messages, drafts or any search you want, configurable under Settings. ☐ **Enable** ☒ **Disable**

Preview Pane
Enable the ability to toggle on/off the ability to view your messages side by side with the message list. ☒ **Enable** ☐ **Disable**



- Inbox - Design Inbox of your preference
- Reading - Read email to convert it into actionable point
- Writing - Write email with proper subject
- Auto-advance
- Keyboard Shortcuts
- Organise using Label and Folder
- Automate Organising
- Plus Addressing

- Flag for follow-up
- Shutdown - Desktop Notification
- Use - Rules and Alert
- Search
- Key Word based Search
- Archive and Housekeeping
- Add-ons

Thank
you

CA Uday Shah

Email: uday@kservices.in

Mobile: +91 99675 47493



Office Security Management

CA Alok R Jajodia

What is Security Management

Security Management describes **controls** that
an organization

needs to implement

to ensure that it is sensibly **protecting** the
confidentiality, availability, and integrity of assets
from

threats and vulnerabilities



Tips for Security in Office

Importance of IT personnel

Avoid Storing Payment Data on Your Servers

Treat Email like a Postcard, Not an Envelope

Use a firewall

Enforce safe password practices

Regularly back up all data

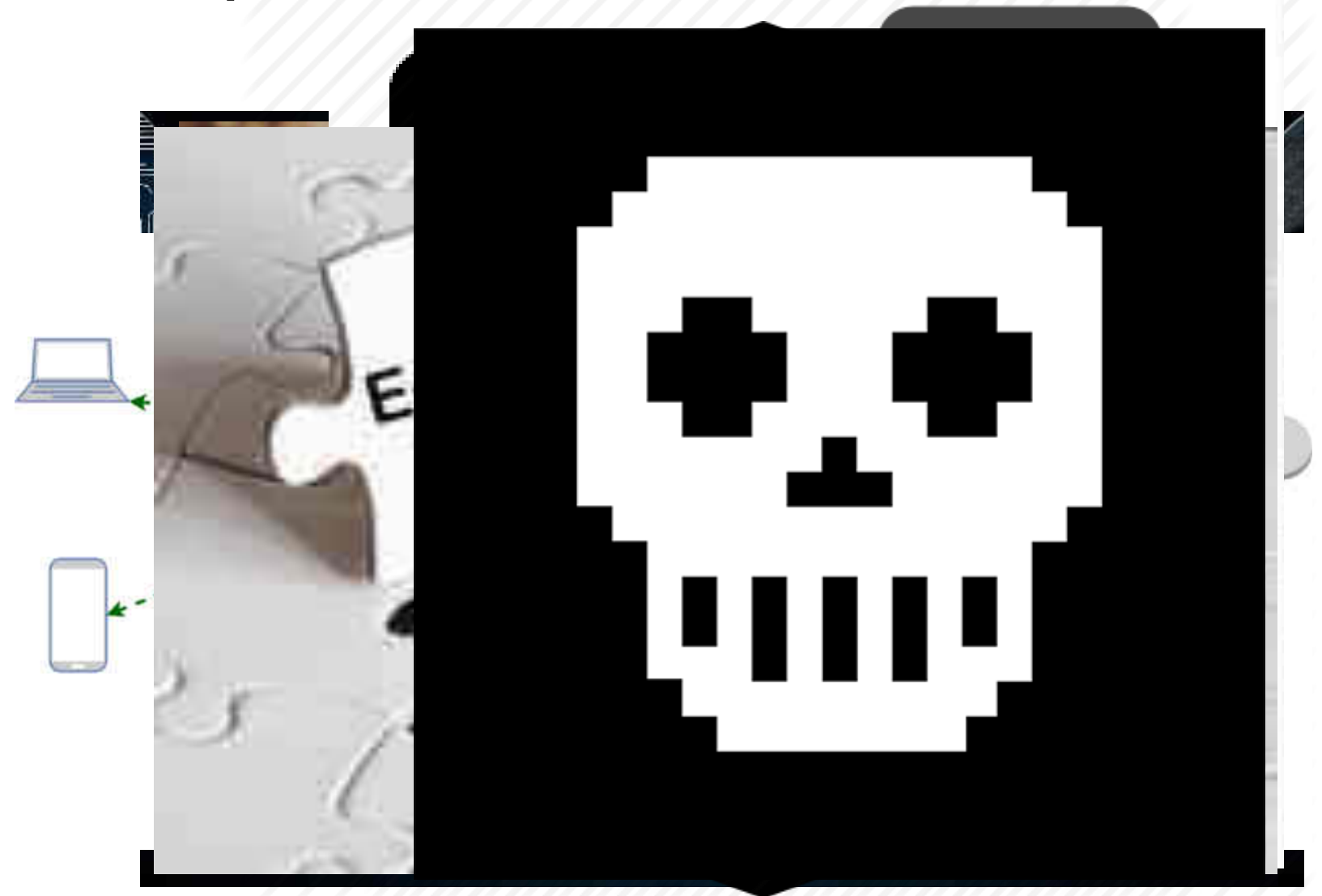
Install anti-malware software

Plan for mobile devices

Two factor authentication

Education to Employees

Don't Leave Loose Ends



Thank
You

CA Alok R Jajodia

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Mobile: +91 9821163916



Document Management

CA Mayur Jain

Document

- It is a common understanding that “a document can either be represented in electronic form (i.e. Word document, Spreadsheet file, Movie file, Sound clip, etc.) or as a traditional hardcopy”.



Various kinds of files that we generate almost daily



Letters, Representations, Presentations – Reports
Financial Statements, Workings papers, etc...
Convert quite a lot to PDF



IT
GST
MCA
E-COMs



Scan Documents and generate
files as PDF or Images

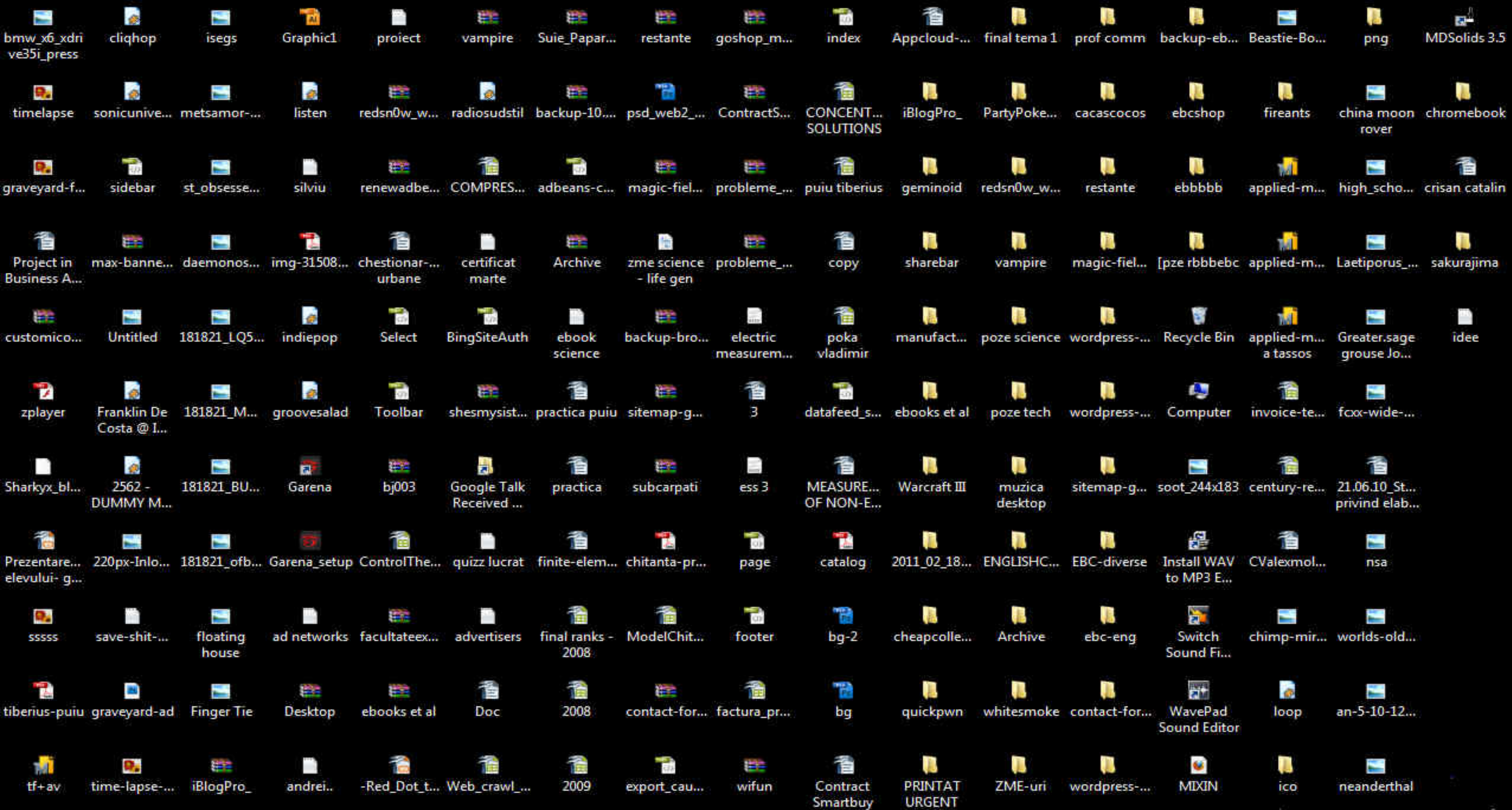


Installation Files,
APKs, Exes

Installing Apps, their
setup files exists



Email conversations,
Downloads files from
emails



Document Management - Goals

It can either be a desktop, document, downloads folder



3 second tip to achieve this magical transformation

Document management is a process/action taken with document within an organization, with respect to the **creation, distribution and deletion** of documents.

Document Management – Key components

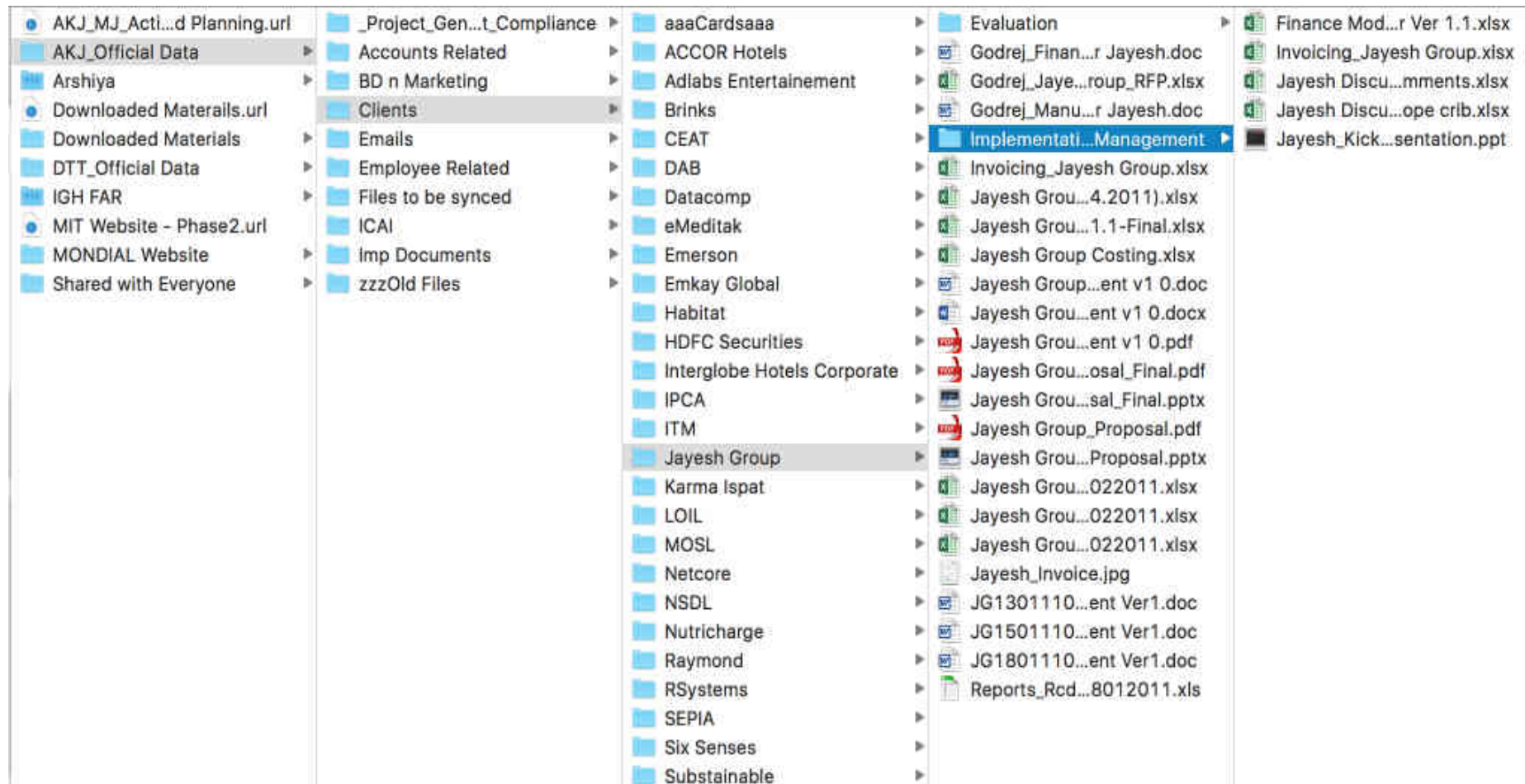
There are six basic components of DMS:

- Capture of documents for bringing them into the system
- Storing and archiving methods
- Indexing and retrieving tools for document search
- Distribution for exporting documents from the systems
- Security to protect documents from unauthorized access
- Audit trails

Document Management - Personal Computing or Businesses



Organize - Standalone or Collaborative



Have a policy framework in place, so that all in the organization follow the same naming convention, folder mechanism

- ✓ Drives >> Folders >> Files
- ✓ Folders in logical hierarchy
- ✓ Folder nested in Folders
- ✓ Naming Convention of Folders and Files to be followed
- ✓ If versions are created, specify version conventions

NAMING ELEMENTS

FOR EXAMPLE
CONTRACT NUMBER
ACCOUNT NUMBER
PROJECT NUMBER
SUBJECT
DATE



Contract.v1.1.3.Final Final Draft.docx

XYZ_ContractNegotiations_20170104_Rev0.pdf

Document Management - Tips

Good File Management Makes Finding What You Want Easy

- ✓ Identify the clutter. Excel > Data > Getdata > Fromfile > Fromfolder > Load.
- ✓ Document naming and storing policy. Clientcode_Documenttype_Date_Version
- ✓ Categorize. Business, Personal, Others >> Branch out >> Nodes. Others (A/B/C, Dates etc.)
- ✓ FOGO. File on the Go. The moment you create the files, save them in the logical folder, with proper naming convention. There should be no isolated, standalone file. No desktop, downloads or documents.
- ✓ Use Tags intelligently for faster retrieval. **Right click >> Properties >> Details >> Tags**
- ✓ Use _ instead of spaces for faster searches
- ✓ Unsure of documents you need currently >> Use zz folders and regularly clean the folder
- ✓ Favorites / frequently used folders/files. Folder >> Right click >> Pin to quick access
- ✓ Can use tools like Total commander, Dropbox, google drive, One drive etc. for real-time document management (cloud sync aps) (Update >> Access >> Back-up)

Document Management - Tips

Good File Management Makes Finding What You Want Easy

- ✓ Google-drive tips/Dropbox:
 - G-drive tips – convert pdf to word. [G-drive >> Right click >> Open with Google docs](#)
 - G-drive Browsing and saving tips – [Chrome extensions >> Save to Google drive >> Open with G-docs](#)
 - G-drive – Use explore functionality. Click and drag images, articles etc. in the document you working on
 - Review deleted files, restore if required.
 - Review access controls
- ✓ Back up your files regularly. Whether you're copying your files onto another drive or onto tape, it's important to set up and follow a regular back up routine
- ✓ Magic Trick

Free Tier Storage

Monthly Price (Lowest-Storage Plan)

 Google One

15 GB

\$1.67 (100 GB)

 **Dropbox**

2 GB

\$9.99 (2 TB)

 iCloud Drive

5 GB

\$0.99 (50 GB)

 OneDrive

5 GB

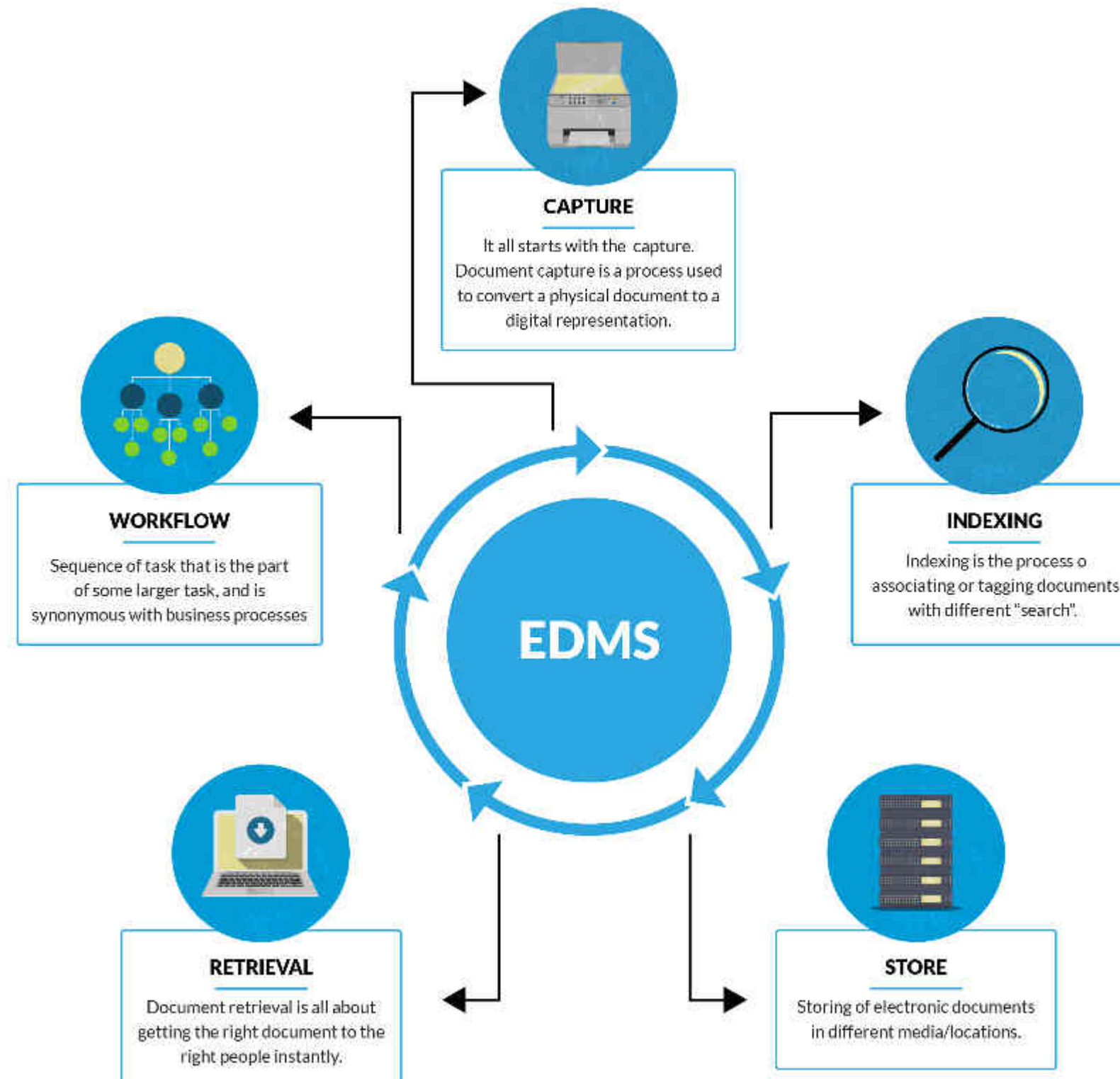
\$1.99 (100 GB)

 sync.com

5 GB

\$4.08 (500 GB)

Document Management - Flow at corporates



Thank
You

CA Mayur Jain

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Backup Management

CA Alok R Jajodia



I am a small Business... Do I Need a back up and recovery plan?

My computer is synced with Cloud...
Do I still need a back up plan?

What do I need to backup?

What kind of backup should I use?

How to handle data recovery?

Why is Back up required?

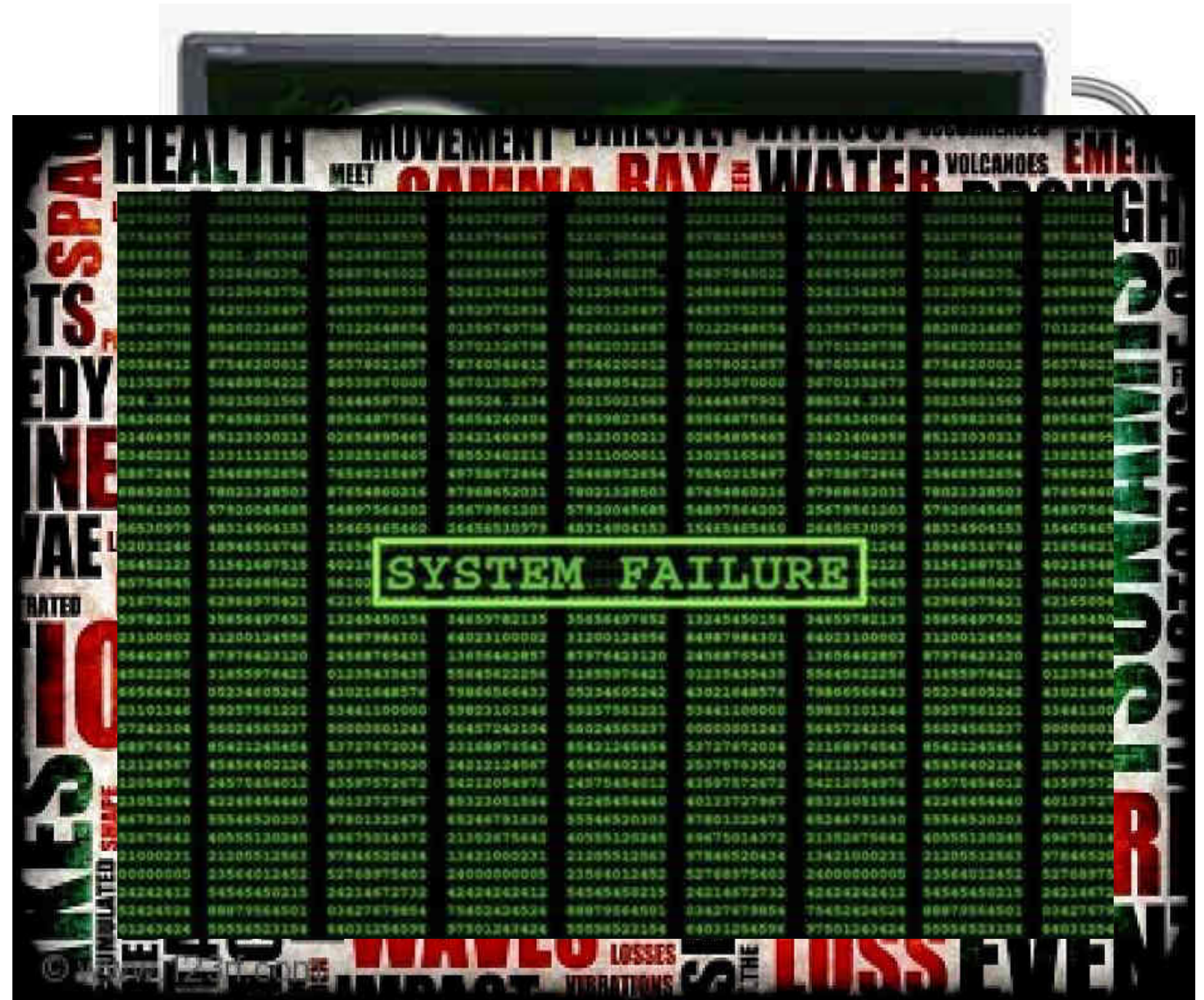
Hardware Failure

Software/Application Failure

Virus Attacks

Human Errors/Factors

Natural Disasters



Considerations while taking Backup

Contents of backup

Frequency & Scheduling

Backup Techniques - Full/Incremental/Cumulative

Retention

Redundancy

Storage Devices

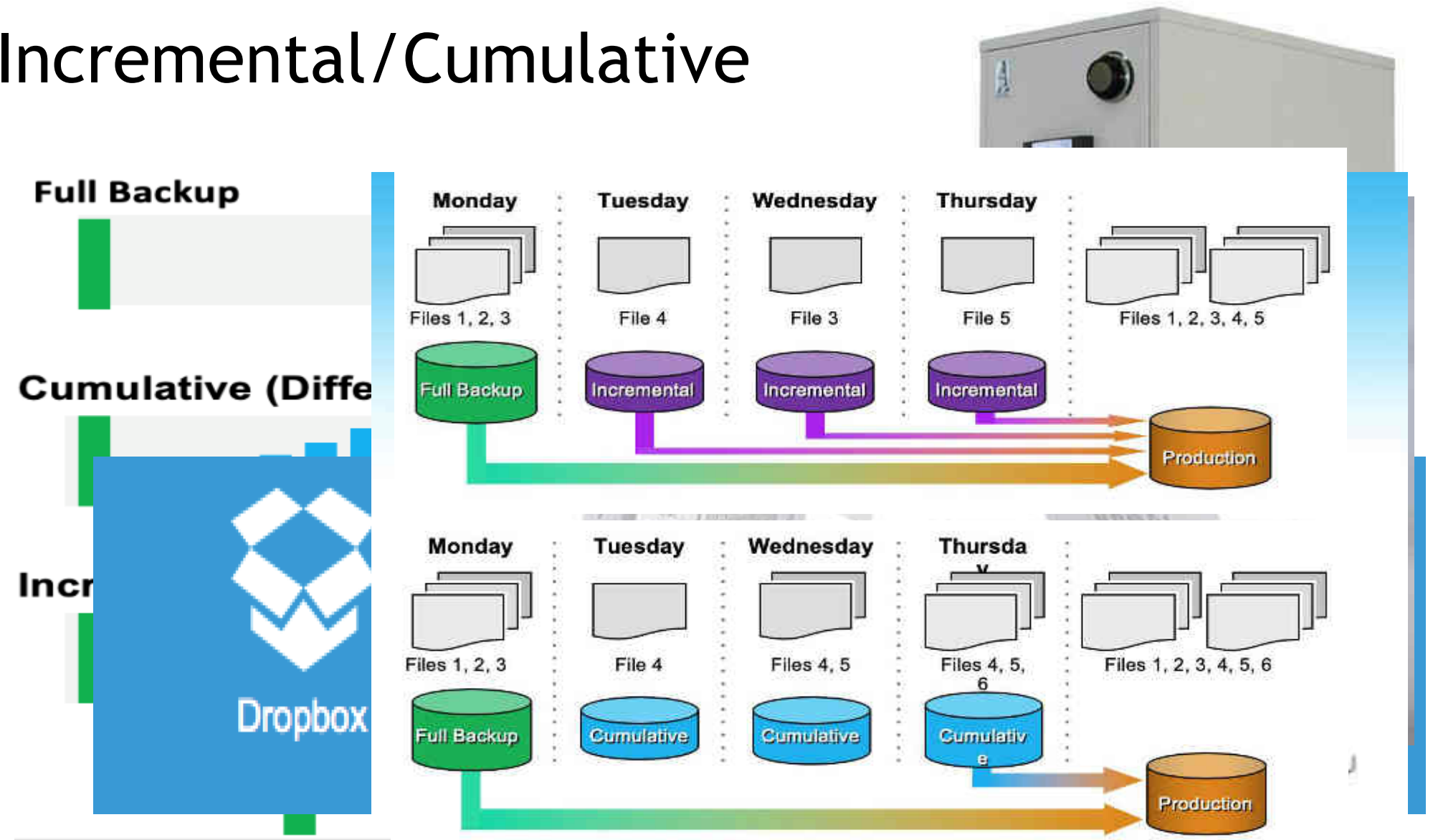
Location

Cloud Backups

Custody

Test Restore

How do I restore



Thank
You

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CALENDAR

SUN	MON	TUE	WED	THU	FRI	SAT
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

Calendar Management

CA Mayur Jain

Calendar - mayur.jain@mondialconsultants.com - Outlook

FileHomeSend / ReceiveFolderViewHelpTell me what you want to do

New AppointmentNew MeetingNew Items

New Teams Meeting

TodayNext 7 Days

DayWork WeekWeekMonthSchedule View

Open CalendarCalendar Groups

E-mail CalendarShare CalendarPublish OnlineCalendar Permissions

Search PeopleAddress BookFind

November 2019

November 2019Mumbai, MaharashtraToday 94° F / 72° FTomorrow 97° F / 71° FThursday 97° F / 74° FSearch Calendar

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
Oct 27	28	29	30	31	Nov 1

Untitled - Event

FileEventScheduling AssistantInsertFormat TextReviewHelpTell me what you want to do

DeleteCopy to My CalendarForward

Teams Meeting

Meeting Notes

Invite Attendees

Show As: FreeRecurrence

Reminder: 18 hours

CategorizePrivateHigh ImportanceLow Importance

Dictate

Save & Close

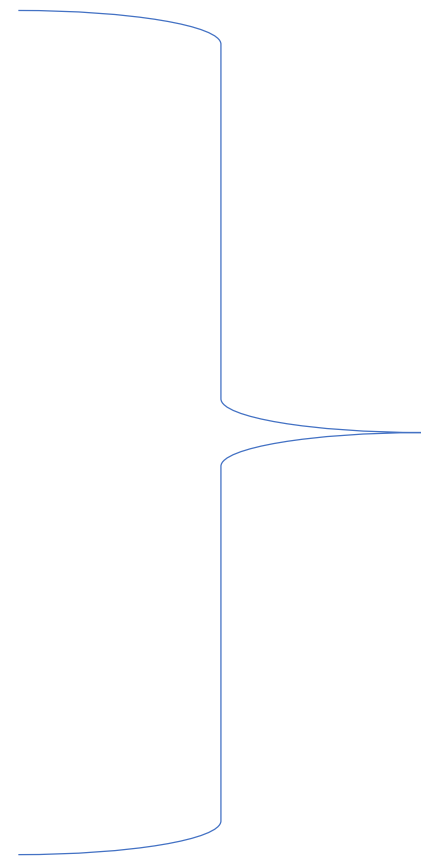
Title

Start timeTue 05-Nov-1912:00 AMAll dayTime zones

End timeTue 05-Nov-1912:00 AMMake Recurring

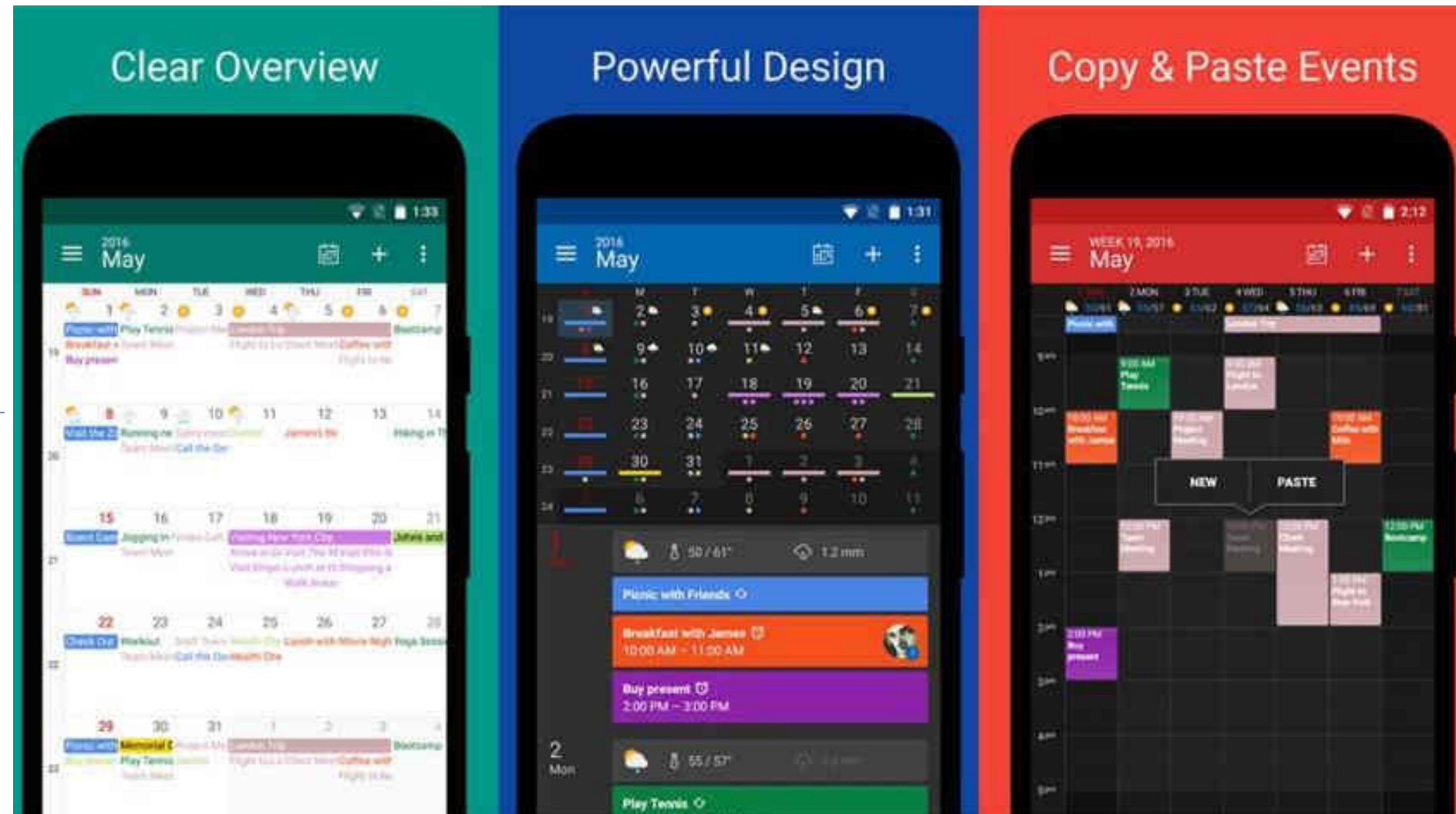
Consolidate - Productivity is the key

Events
Meetings
Reminders
Due dates
Tasks



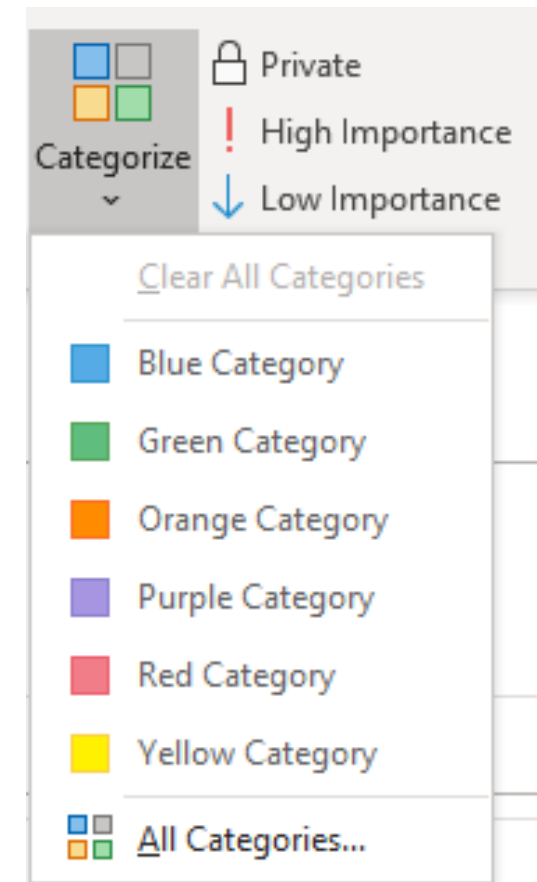
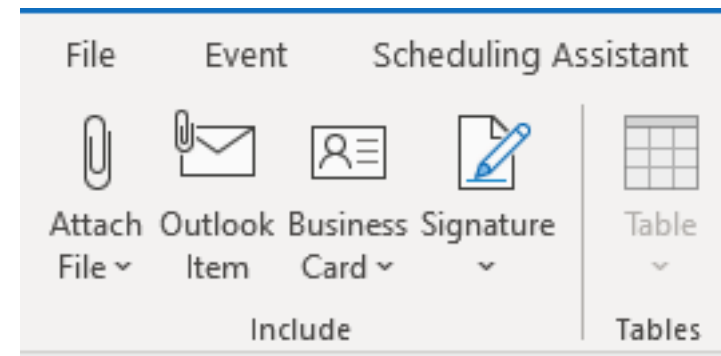
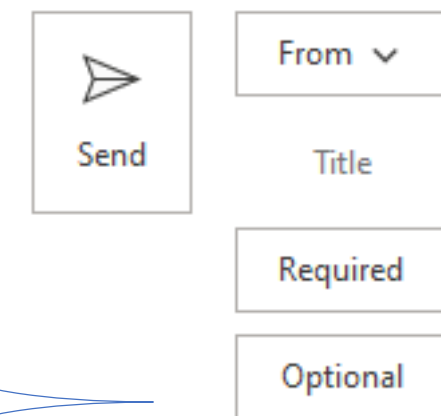
Create a routine - use mobile calendar

- Real time sync
- Quick add tasks
- Set themes
- Sync multiple calendars



Create an effective meeting invite

- Invite options (m/o)
- Pre-book conf. rooms
- Color code meeting
- Attach agenda, notes, documents for pre-read



Click Home > New meeting, appointment, tasks > Insert > attach files

Click Home > New meeting, appointment, tasks > Response options > Request responses

Recurrence feature under events

- Statutory due dates
- Credit card due dates
- Review meetings
- Internal calls

The screenshot shows the 'Appointment Recurrence' dialog box. At the top, there are options for 'Show As' (Free), 'Reminder' (18 hours), and a 'Recurrence' button. To the right are 'Tags' for 'Private', 'High Importance', and 'Low Importance'. The main section is divided into three parts: 'Appointment time' with fields for 'Start' (12:00 AM), 'End' (12:00 AM), and 'Duration' (1 day); 'Recurrence pattern' with radio buttons for 'Daily', 'Weekly' (selected), 'Monthly', and 'Yearly', and a section for 'Recur every 1 week(s) on:' with checkboxes for days of the week (Tuesday is checked); and 'Range of recurrence' with 'Start' (Tue 05-Nov-19) and 'End by' (Tue 21-Apr-20) options, along with 'End after: 25 occurrences' and 'No end date' options. At the bottom are 'OK', 'Cancel', and 'Remove Recurrence' buttons.

Click Home > New meeting, appointment, tasks > Recurrence

Request and share calendars

- Avoid double booking, conflicts
- Pre-check schedule, bookings
- Share your schedule

Mayur Jain Calendar

Wednesday, November 13, 2019 – Tuesday, November 19, 2019
Time zone: (UTC+05:30) Chennai, Kolkata, Mumbai, New Delhi

November 2019

Su Mo Tu We Th Fr Sa

					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

☐ Busy ☒ Tentative ☐ Free
☒ Out of Office ☒ Working Elsewhere ☐ Outside of Working Hours

November 2019

▲ Wed, Nov 13

<input type="checkbox"/>	Before 8:00 AM	Free
<input type="checkbox"/>	8:00 AM – 5:00 PM	Free
<input type="checkbox"/>	After 5:00 PM	Free

▲ Thu, Nov 14

<input type="checkbox"/>	Before 8:00 AM	Free
<input type="checkbox"/>	8:00 AM – 3:00 PM	Free
<input checked="" type="checkbox"/>	3:00 PM – 5:00 PM	Tentative
<input checked="" type="checkbox"/>	5:00 PM – 11:30 PM	Tentative
<input type="checkbox"/>	After 11:30 PM	Free

▲ Fri, Nov 15

<input type="checkbox"/>	Before 8:00 AM	Free
<input type="checkbox"/>	8:00 AM – 5:00 PM	Free
<input type="checkbox"/>	After 5:00 PM	Free

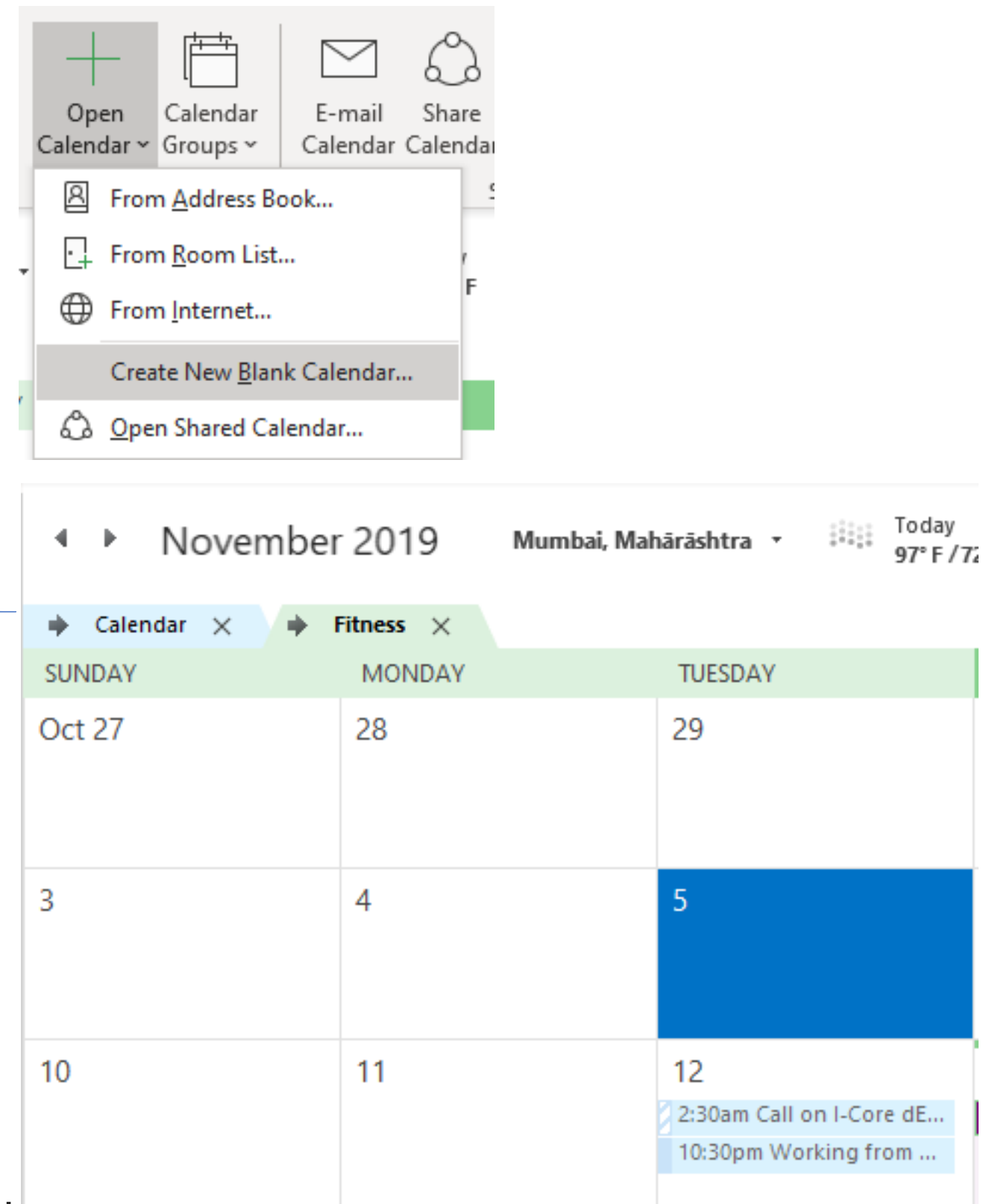
▲ Sat, Nov 16 – Sun, Nov 17

<input type="checkbox"/>	All Day	Free
--------------------------	---------	------

▲ Mon, Nov 18 – Tue, Nov 19

Create multiple calendars

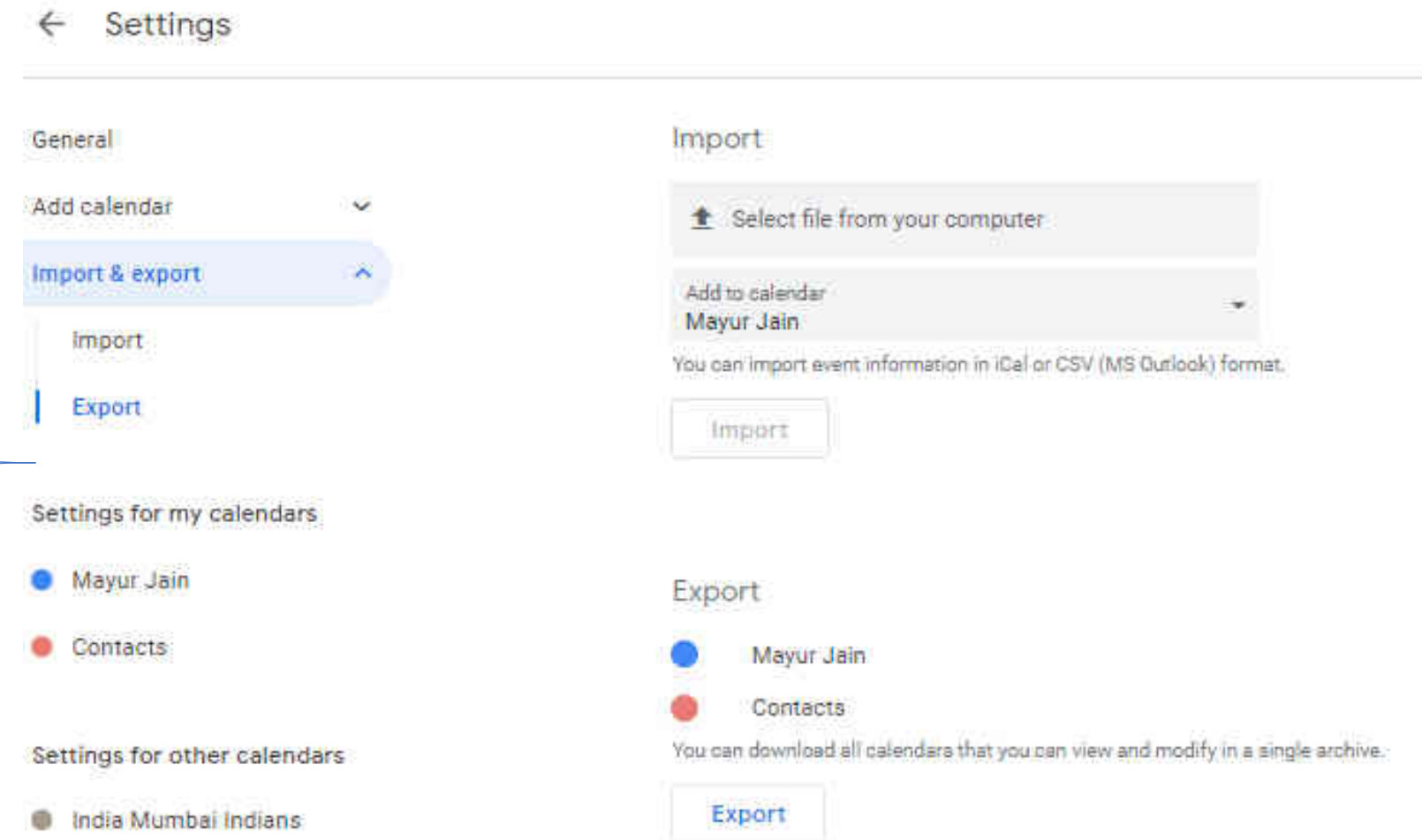
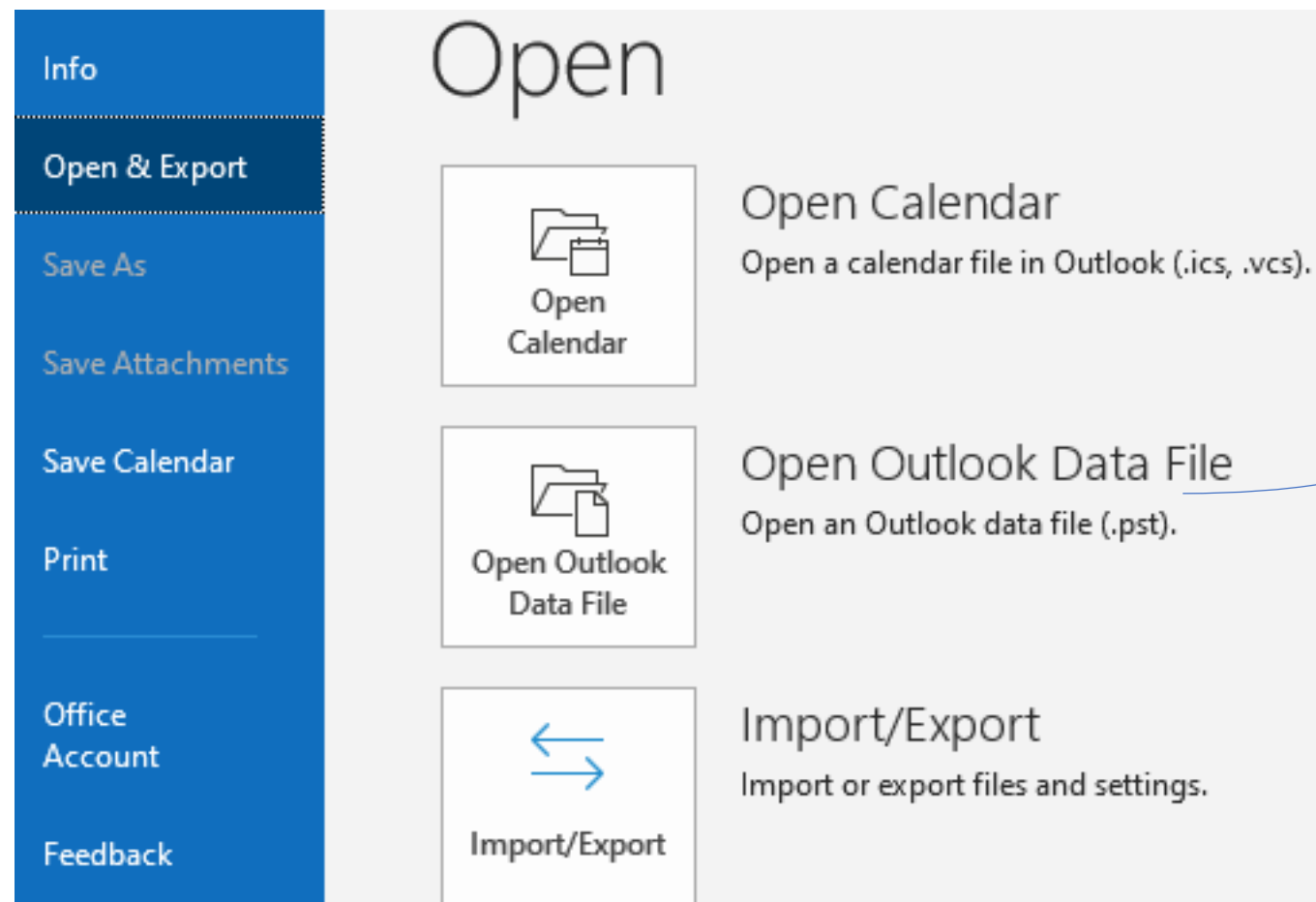
- Business, personal, fitness
- Overlay views
- De-clutter your tasks, events, schedule



Click Home > Open Calendar > Create new blank calendar

Import / Export calendars


- Export Google calendar and import (ical)



Convert mails to tasks quickly

- Drag mails onto calendar
- Define quick actions to collaborate
- Create reminders, recurrence etc.



 Save & Close

Title	Fwd: Masters		
Start time	Wed 13-Nov-19	7:00 PM	<input type="checkbox"/> All day <input type="checkbox"/> Time zones
End time	Wed 13-Nov-19	7:30 PM	Make Recurring
Location			

From: Mayur Jain <mayur.jain@gmail.com>
Sent: Tuesday, November 12, 2019 6:09 PM
To: Alok
Subject: Fwd: Masters
Attachments: Master_170919.xlsx

Rgds/Mayur Jain

https://docs.google.com/uc?export=download&id=1zCUcx00E65kuUDmA5P_BK4Bc4sC

Other useful features - effective meetings

- Multi select days/dates – workshops etc.
- Add meeting location – weather forecasts
- Search within calendars

Mumbai, Mahārāshtra ▾

Washington, D.C.
Mumbai, Mahārāshtra
Add Location

Today 96° F / 71° F ☀ Tomorrow 96° F / 71° F ☀ Friday 94° F / 71° F ☁

TUESDAY	WEDNESDAY	THURSDAY
29	30	31

WEDNESDAY	THURSDAY	FRIDAY	
30	31	Nov 1	
6	7	8	
13	14	15	
8:00am	Yoga; Mayur Jain		8:30am
	9:00am	Review meets	9:30am

Search People

Address Book

Find

Search Calendar

Tips in the nutshell

- ✓ Consolidate – Productivity is the key
- ✓ Create a routine – use mobile calendar
- ✓ Create an effective meeting invite
- ✓ Recurrence feature under events
- ✓ Request and share calendars
- ✓ Create multiple calendars
- ✓ Import / export calendars
- ✓ Convert mails to tasks quickly
- ✓ Other useful features – effective meetings

Thank
You

CA Mayur Jain

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Mobile: +91 97697 80978