Getting Started

with CleanOut ®

v2023.2

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Introduction

If you're looking for a much quicker way to check your email and to stay organized, then the CleanOut app and this Getting Started Guide is for you.

This guide explains:

- What is CleanOut,

- How it works,

- How to install & configure it, and

- How to use it

Although you may be tempted to jump straight to the Installation section you are encouraged to take a few minutes to read the next section as it will introduce you to the basic concepts and how to have the most success with CleanOut.

Please refer to the Glossary in Appendix A if there are terms you are not familiar with.

You are also encouraged to visit the Support section of the Lucky Duck Software website which includes helpful how-to videos, FAQs, the Customer Care page and References to useful links to articles and websites on time and email management.

The CleanOut Manifesto

Why do I need CleanOut?

If you're like most people, you've been using email for most of your adult life and although you may have developed a routine for managing it you may feel that your current approach is far from perfect. The avalanche of email is not slowing down and you have to choose between multi-tasking while on calls or working on weekends/nights to keep up, or allowing the number of unread emails to grow into the thousands at which point you may feel overwhelmed by *Information Overload*.

There's a lot of focus these days on reducing the number of emails you send/receive with <u>team</u> collaboration tools like Slack and Microsoft Teams (plus other tools you may personally use like Skype, SMS, WhatsApp, WeChat, Facebook Messenger etc.) a massive number of messages are still sent by email, which just means you have more inboxes to check!

Despite the popularity of these tools they don't help the individual working <u>alone</u> at 10pm, after a busy day of meetings and calls, who still has eighty unread messages received that day, and hundreds or thousands from weeks gone by, trying to manage them with essentially the same inbox technology as they had thirty years ago.

CleanOut was created for those who can relate to this and are open to the idea of trying something new. Be warned however that the biggest challenge you will face in changing the way you manage email is not the technology but unlearning decades of old habits that are deeply entrenched into your routine. The reward for those who persevere to learn the new way, though, is much more free time, greater responsiveness to the most important people in their lives and a sense of confidence that they are well organized and have things under control.

What is CleanOut?

CleanOut is an app that provides a much faster way of checking your email while helping you organize the messages you want to keep and reminding you to follow up on your action items.

The How CleanOut Works and Using CleanOut sections explain how it does this in more detail but it is worth taking a minute to clarify what CleanOut is not.

CleanOut is NOT a new email client to replace Outlook. CleanOut complements Microsoft Outlook (including Office 365 and Outlook.com) by giving you additional tools for *checking your email* which is where people spend most of their time. CleanOut is built on the belief that Outlook already has all the features most people need but power users just need additional help when dealing with massive amounts of complex email. If you only have a few new messages, want to send a new email, check your calendar etc. use Outlook as you normally would. But when your Inbox is overflowing get out "the big gun" and use CleanOut!

How CleanOut Works

The core features that allow CleanOut to achieve the order-of-magnitude improvement in productivity are:

- Checking your email in priority order

- Focusing on one email at a time

- Understanding the context of a message in a conversation

- Automating workflows using the 4 D's of time management

- Dealing with entire conversations and not just a single message

Checking your email in priority order:

For most people their objective when they check their email is to get in and out as quickly as possible while making sure they read (and possibly reply to) the most important messages. Two possible approaches to do this are:

- start with the newest (or oldest, it doesn't matter) message in your Inbox and work your way sequentially through your Inbox until you run out of time and have to go do something else or you get to the last message

- visually scan through the Inbox and figure out which emails to read based on Subject, Sender, Importance flag etc.

The problem with either approach is that they don't scale for anyone who receives 100+ emails per day or has multiple Inboxes to manage. That number is even lower if the emails contain complex information (e.g. legal, technical, financial) that require more thought.

In the first approach you run the risk that you will not get to the most important message, before you run out of time, and will have wasted your time on less important subjects.

The second approach, which has been likened to chickens scratching and pecking for grain to eat, is stressful deciding what to look at first, second, third etc. for fear of missing the most important messages.

CleanOut, on the other hand, uses the power of Machine Learning to assign a score to each message, between 1 and 1000, based on its predicted importance to you.

These scores are calculated on the statistical probability of you taking a certain action on a message based on:

- The message contents and attributes

- Position of the message in the conversation

- Who is it is from, who it was sent To and who was CC'ed (or not)

In the process, CleanOut looks at combinations of different factors to determine the joint probability of you taking action which often results in scenarios for important messages that you would never have thought of. For example, an email from your CEO sent on Saturday morning is way more important than either a message from the CEO at any other time, or a message from anyone else on a Saturday morning.

The most important aspect is that the Machine Learning algorithm learns what is important to <u>you</u> and the more you use CleanOut the smarter it will get at predicting what is and is not important to you. Therefore, you won't begin to see the full power of CleanOut until after a few weeks of use.

If you're not ready to see your emails in priority order yet, there is an option to go through them in date order if you prefer.

<u>Focusing on one email at a time:</u>

Once it has sorted your messages, CleanOut presents them to you one at a time so that you can <u>focus</u> on deciding what to do with that conversation/message. While this approach is new for checking your email, think of it as being like watching the news on TV. They lead with the most important stories and discuss only one story at a time. Even personalized internet news services like Google News or Apple News show the stories that they believe are most relevant at the top, based on which stories you clicked on in the past.

<u>Understanding the context of a message in a conversation:</u>

As mentioned earlier, a unique feature of work email is that there are often lots of conversations where many people have replied to an email and figuring out what is going on, especially when there are multiple threads, can take some time.

To help you quickly get up to speed, CleanOut shows you a concise summary of the *Context* so you can understand where this message fits into the conversation. This includes features that let you see the hierarchy of messages in the conversation and summarize the contents of the conversation.

Automating workflows using the 4 D's of time management:

Now that you understand the Context of a conversation/message, the next step is to decide what to do with it. Rather than reinvent the wheel, CleanOut leverages a proven time management approach called the 4 D's. You can find many books, articles and videos describing the 4 D's which are Delete, Defer, Delegate and Do It. CleanOut adds three more Actions which are File, Skip Previous and Skip Next.

CleanOut automates the 4 D's by performing multiple tasks for each Action. For example, after clicking OK on the Delegate action:

CleanOut will send an email to whoever you are delegating it to, move one or more messages to a filing folder, assign it a Category, delete one or more messages from your Inbox and create a Task and/or Calendar Entry to remind you to follow up. Most Outlook users delegating a task would probably not bother to do most of these six possible tasks but with CleanOut they can be done in a single click.

Dealing with entire conversations and not just a single message:

You may have noticed in this section that the words Conversation and Message have been used interchangeably as CleanOut allows you to work with either. Normally when you're using Outlook you are dealing with one message at a time. CleanOut, however, allows you to Delete or File the entire conversation in a single Action which gives you incredible *leverage* as you check your email.

In regular usage, the word *leverage* refers to the ability to produce a much larger amount of force than is exerted. In this context, it refers to the ability to act on entire conversations when dealing with a single message.

Take an example of where you received 100 emails on a certain day, with an average of five emails per conversation. Assuming you waited until the end of the day to check your email, you could process all your new messages in an average of 20 Actions with CleanOut as compared to 100 using regular Outlook, as illustrated below:
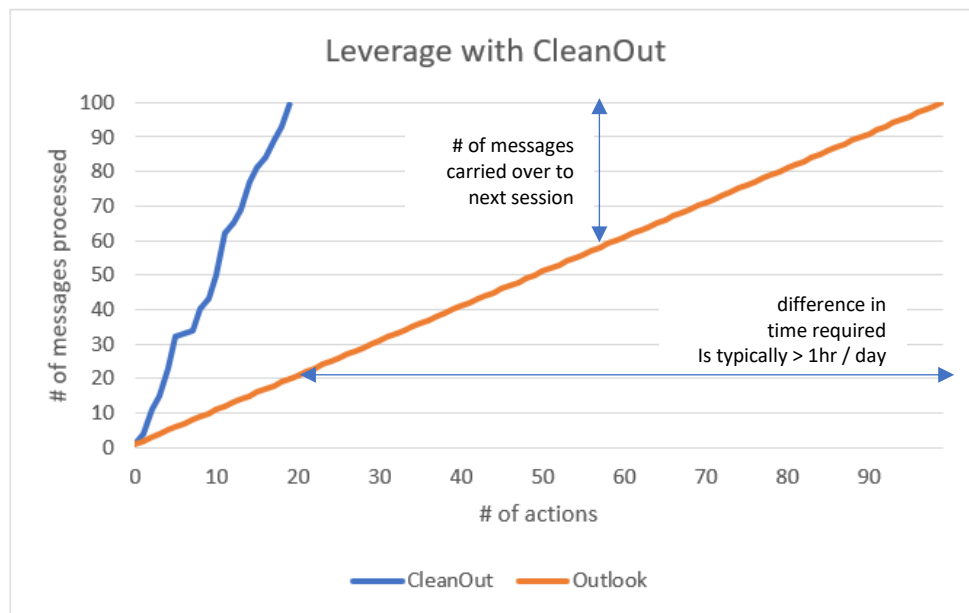
The reality, of course, is that most Outlook users won't make it through all 100 messages in a single session so the remaining messages will pile up for another day.

Installation

CleanOut Versions

There are three versions of Outlook to choose from:

- CleanOut for Outlook

- CleanOut

- CleanOut for Xbox

CleanOut for Outlook, which is an Office Add-in is recommended if you have Microsoft Outlook installed on Windows and are using it for work or other complex email. As the flagship product, it has more features than the other versions and has the best performance on large email volumes.

The basic CleanOut app is great for people with 2-in-1 touch devices (such as Microsoft Surface), as it is optimized for tablet-mode, while CleanOut for Xbox allows you to check your email on your TV without having to boot up your laptop.

Refer to the Compare Versions table on the Lucky Duck website for more details.

If you prefer to watch a YouTube video walking you through the installation steps rather than read the rest of this section, please go the Documentation page on the website.

CleanOut for Outlook

Installing the CleanOut for Outlook Add-in

The easiest way to get started is to close Outlook and any other Office applications that are running, go to the Free Trial page where you can request a 30 day trial and download the Add-in all in one place:

If your email client is Outlook for Windows desktop, it's important that you select the right version of Outlook that you have installed (32-bit or 64-bit). If you're feeling lucky, the vast majority of Office users have the 32-bit version (even though you may have 64-bit Windows) so if you try that version you should be OK. And if it doesn't work come back and get the 64-bit version from the Downloads page.

If you're not a gambling person, and want to find out what version of Outlook you have, you can do so by going to:

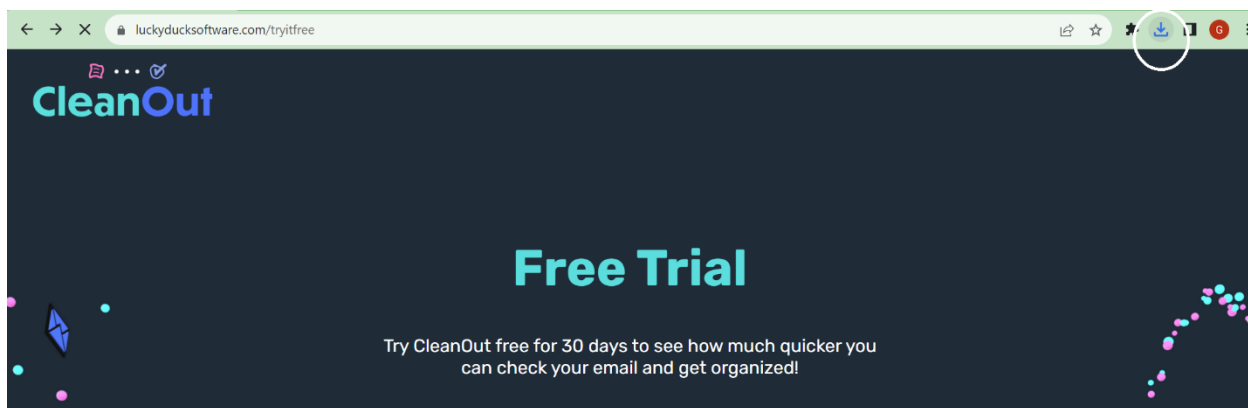- File > Office Account > About Outlook in Outlook 2013, 2016 and 2019

About Microsoft® Outlook® for Microsoft 365

Microsoft® Outlook® for Microsoft 365 MSO (16.0.12624.20422) 32-bit
License ID: CWW_dc09e8cb-5f46-47ce-8e06-827f8218a02e_dc09e8cb-5f46-47ce-8e06-827f8218a02e_a021219f031c7cac77
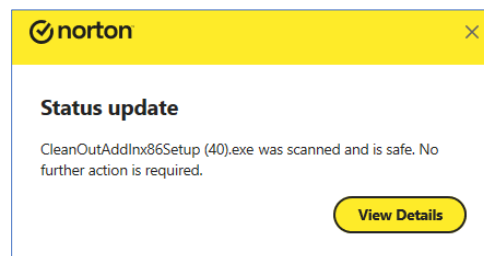Session ID: 351449DA-56DC-4865-9637-257C3A3E6074

Third Party Notices

After you click the "START MY FREE TRIAL" button you will be sent an email with a 30-day free trial software key and the download will automatically begin:

luckyducksoftware.com/tryitfree

CleanOut

Free Trial

Try CleanOut free for 30 days to see how much quicker you can check your email and get organized!

When the download is complete, click on the down arrow in top right corner (in Chrome) and select Open to launch the installer.

*For your safety and security, the Installer and the CleanOut Add-in are signed with a Code Signing certificate:*

norton

Status update

CleanOutAddInx86Setup (40).exe was scanned and is safe. No further action is required.

View Details

Refer to the screen shots in Appendix C of what you will see during the installation process.

After the install is complete, check your Outlook email to verify that you received an email like this:
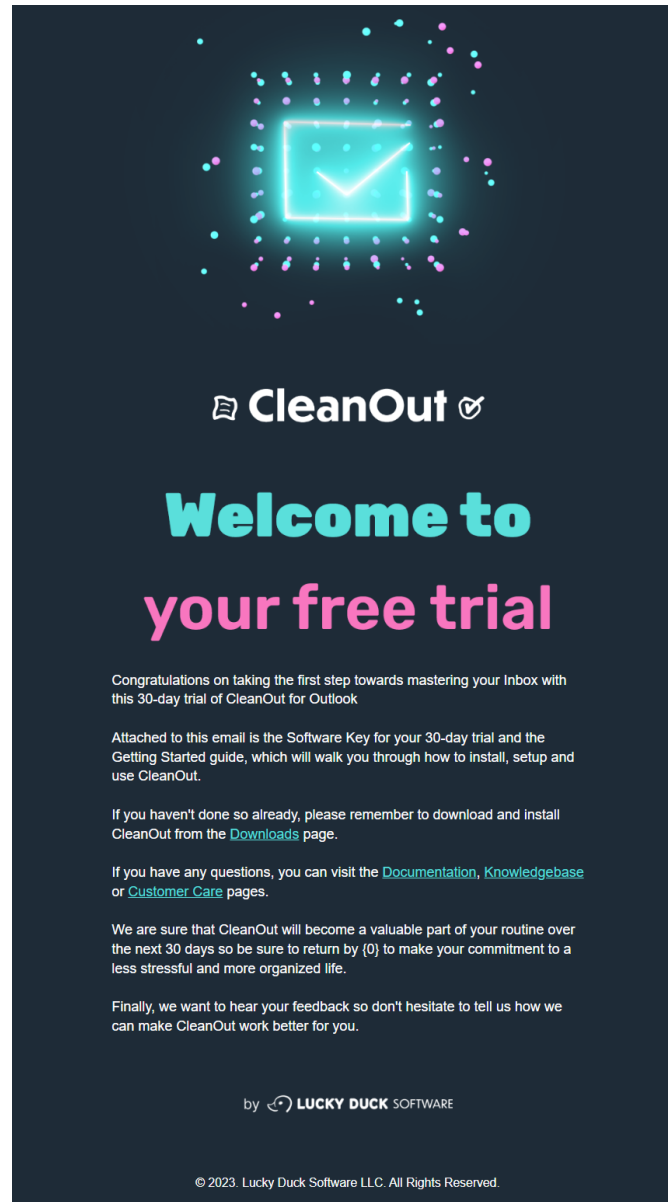

You don't need to do anything with the email except make sure it is in your Inbox as it will be used in the next step to verify that you have a valid key. If this email was sent to your Junk or Spam folder, move it back to your Inbox.

Starting CleanOut for Outlook Add-in for the first time

You will now see a new section in the Outlook Ribbon called Lucky Duck. Click on either the Score or Open Mail buttons on this ribbon and the Welcome screens shown in Appendix D will be displayed. You can now skip to Using CleanOut.
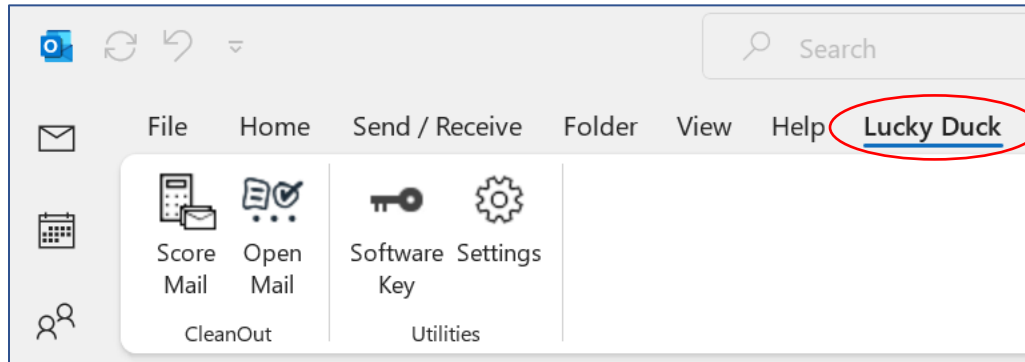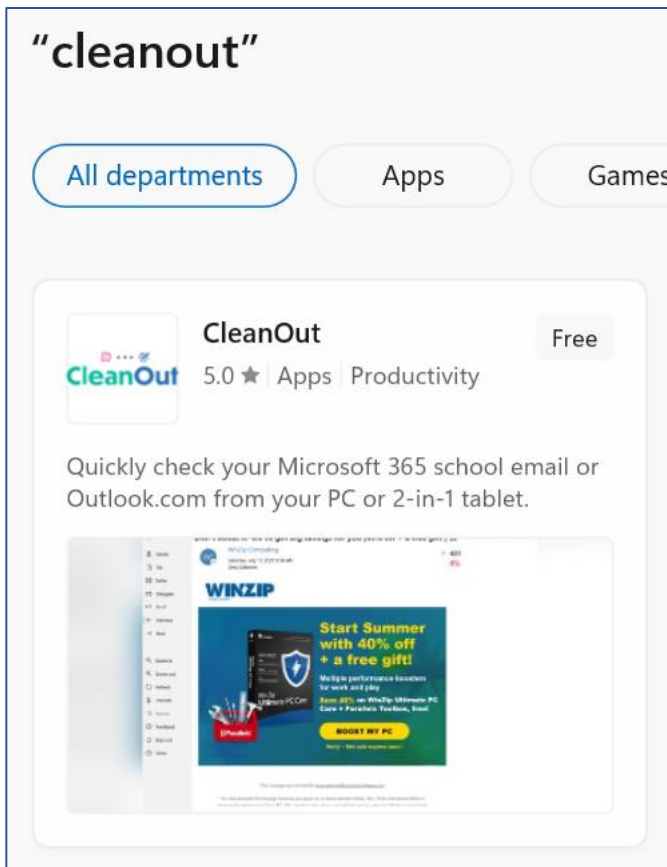
CleanOut and CleanOut for Xbox

The process of installing these two apps are very similar so although the screen shots in this section are for CleanOut, you can still follow along for CleanOut for Xbox.

Installing the CleanOut or CleanOut for Xbox Apps

To download these apps, go to the Microsoft Store on your Windows or Xbox device and search for 'CleanOut':
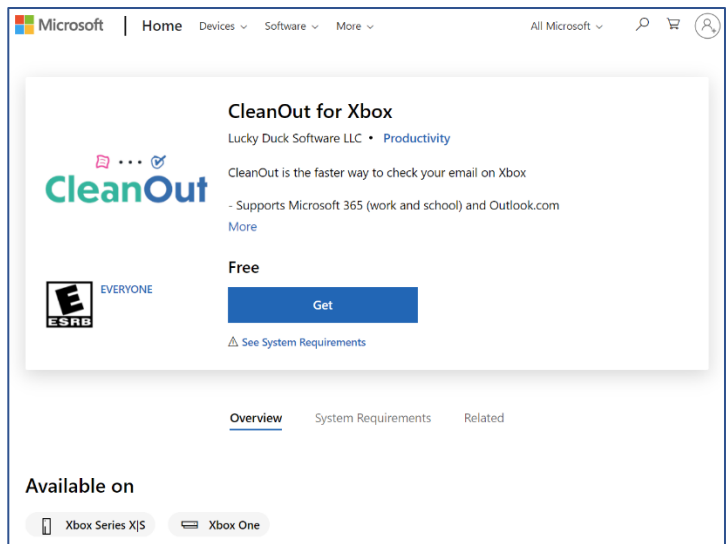
Click on the one that you want, and you will see the screen shown on the next page. Note that a Software Key is not required for the CleanOut apps as they are free.
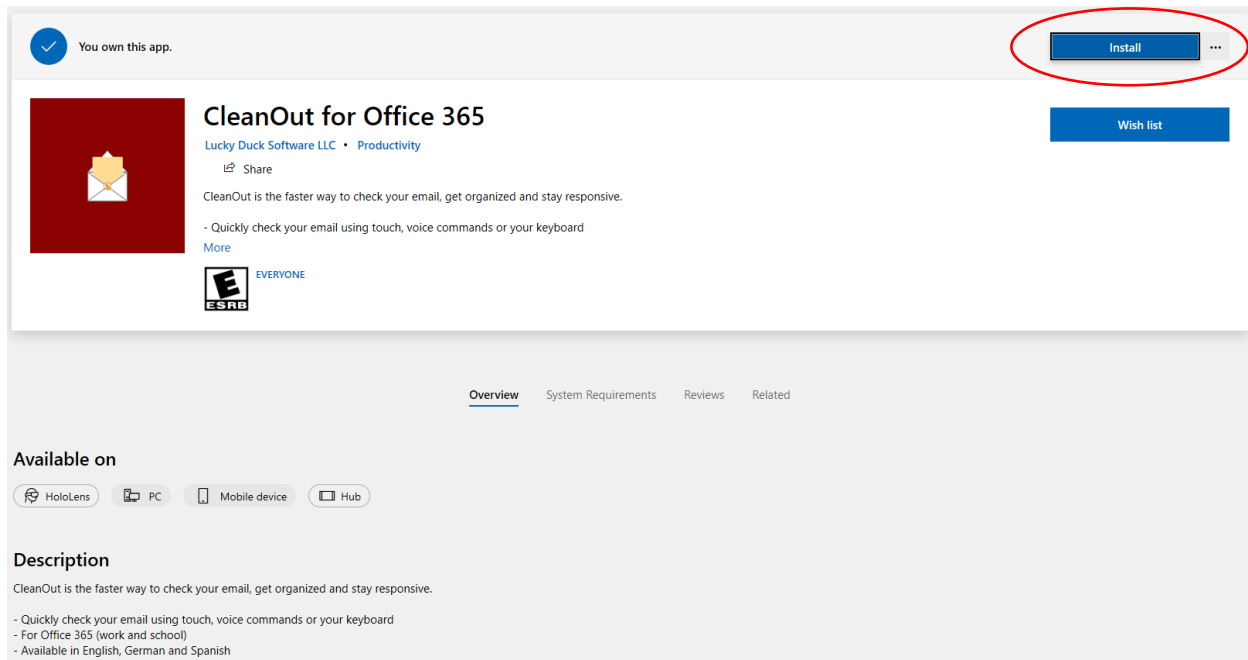
Click on the Install button which will download the app and you will get this message:
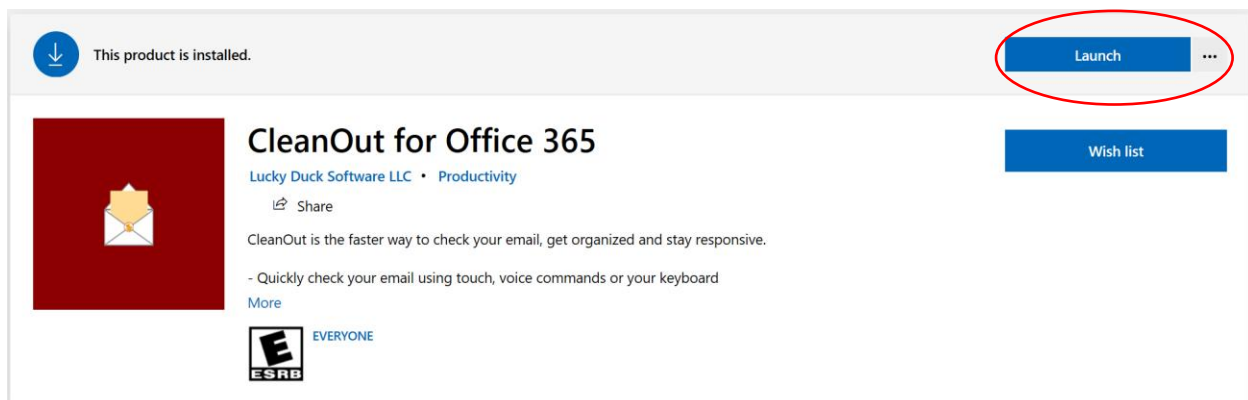
Starting the CleanOut apps for the first time:

Click the Launch button and it will then display the Welcome screens as shown in Appendix E. You will then be ready to use CleanOut and can continue in the next section: Using CleanOut.
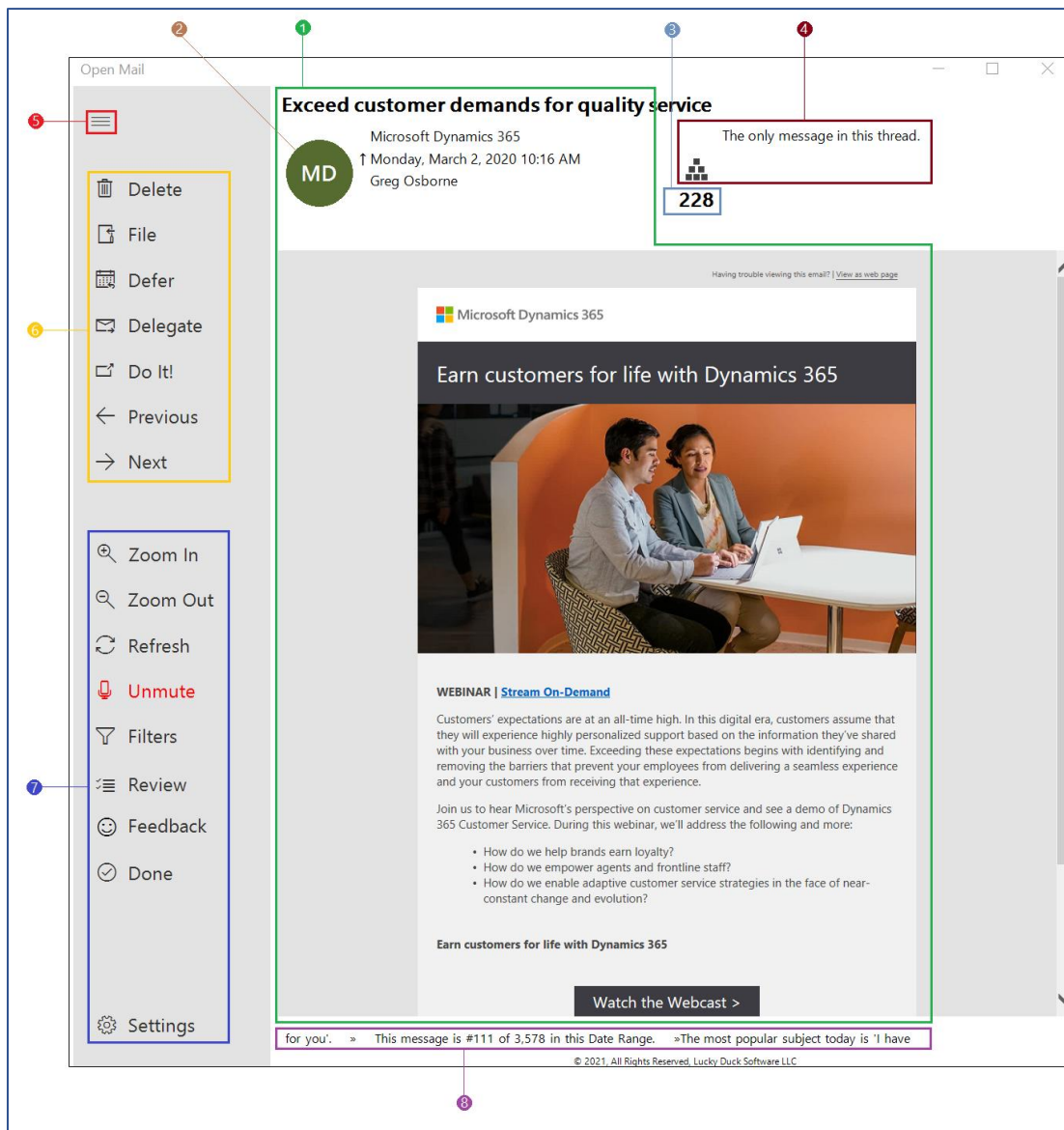
Using CleanOut

The basic flow, which is common to all versions is:

1. An email is displayed

2. Decide what to do with it

3. Repeat until you either get to the last message or you exit the app

Layout

The basic layout is shown below:

1. The email body, subject, sender etc. Note that for your safety any hyperlinks in the email body are disabled.

2. If a picture of the Sender is available, it will be shown here otherwise their initials. In CleanOut for Outlook and Office 365, you can click on the circle to initiate chat with the sender using Microsoft Teams or Skype for Business.

3. The message Score which is a number between 1 and 1,000 indicating the importance of the message.

4. A concise summary of the Context of the current email including number of emails in this conversation, how many emails from the end the current email is and when the most recent email in the conversation was received. Click on the button to view the hierarchy of all the messages in the conversation or the ∑ (summation) button to see a 3-5 bullet summary of the conversation.

5. Click the 'hamburger menu' (≡) to expand or collapse the labels (Delete, File etc.) for the icons in the navigation menu, which will make more room available for the email.

6. The Action commands which you use to do something with the current email or conversation. Refer to the next section for more details.

7. The app commands enable you to change various settings and options. These vary a little between versions. Refer to the app commands section for more details.

8. The information section at the bottom provides useful information to keep you focused on Cleaning Out your Inbox. You can choose from:

   • A scoreboard which shows at a glance how far you are through your messages (in the given date range), how you're doing Cleaning Out your messages, how many messages you have put in the trash can / filing folder, and how long you have been using the app.
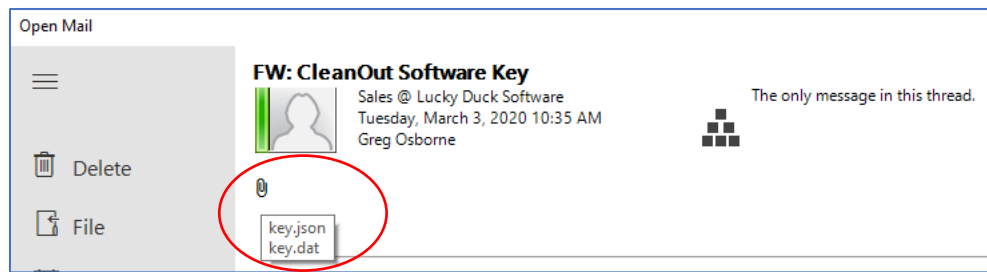

   • A ticker or marquee that keeps you informed of trending messages, upcoming meeting, message volumes etc. The speed of the ticker can be changed in the Settings.

Attachments

If the email has attachments a paperclip will appear in the top left-hand corner:

If you hover over the paperclip a list of the attachments will be displayed (only in Clean for Outlook). To view the attachments, open the mail by clicking on Do It, just like you would do with an email in your Inbox.

Context

The first place to look, after the email itself, is the Context area in the top right corner. The context will help you quickly understand *where* this email fits into a larger conversation (if applicable). You can click on the hierarchy button ⛁ to view all the messages in the conversation:
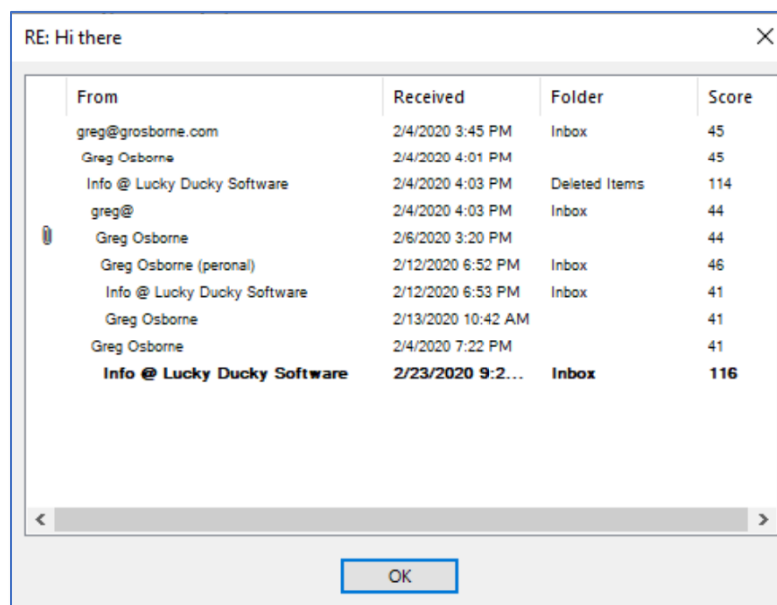
You can open any of the messages in the list by double-clicking on them.

Click on the Σ (summation) button and a 3-5 bullet Message Summary of the conversation will appear in a separate window. The screenshot below shows a simple example, but the real power of this feature is realized when you have a large conversation, with many participants, which would normally take you a long time to read.
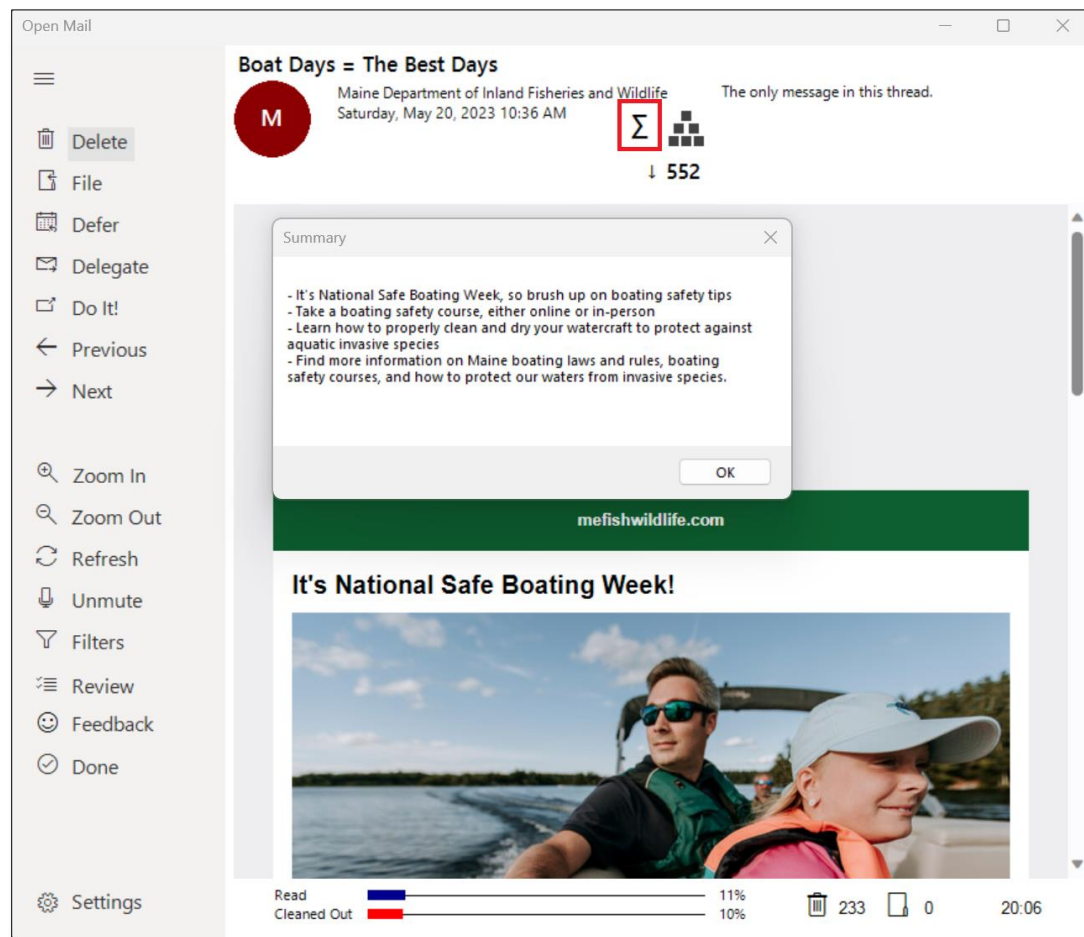
The Message Summary is powered by ChatGPT 3.5 and requires you to have an OpenAI account. OpenAI offers a free tier and various paid subscriptions based on the number of "tokens" that you use each month (in English 1,000 token is about 750 words). CleanOut only calls ChatGPT when you click on the Σ button, so you have full control over your consumption. See here for more details.

NOTE: You are responsible for:

a.   Ensuring that summarizing emails is an acceptable use case in your employer's Acceptable AI Usage policy, if applicable.

b.   Reviewing the content of an email for your, or anybody else's, private or confidential information before you create a Message Summary with it.

c.   Acknowledging that you will not rely on the Message Summary alone to make important decisions. GenAI models are a powerful time saving tool but are known to have "hallucinations" where the response is not accurate, so exercise caution when making important decisions based on it.

Refer to the Settings section for details on entering your OpenAI account information.

Action Commands

The Action Commands are used to do something with the email/conversation[1] currently being displayed. In the traditional 4 D's approach to time management (which applies to any task, not just email) you <u>sequentially</u> ask yourself these four questions:

1. Do I have whatever information I need from this email so can I go ahead and **Delete** it?

2. If not, if I am the only person who can work on it and I need more time than I have now, **Defer** working on it to another day/time?

3. If not and there is someone else who can take care of it, can I **Delegate** it?

4. If not, its urgent or will be quick[2] then **Do It** now.

As mentioned earlier, there are many articles, books and videos available that describe the 4 D's in much more detail.

CleanOut adds to the standard 4 D's list of actions:

5. If I don't need to do any more with it but I want to keep it, then **File** it.

6. I'm not ready to decide what to do with it now, so **Skip** it.

A word on Deleting and Filing*: when you Delete or File emails while using CleanOut your messages are put into a <u>virtual</u> trashcan or filing folder and are not moved out of your Inbox until you end the session by either advancing to the last message OR you click the Done button. At this point you will be asked if you want to empty the trashcan and/or filing folder or not.*

If you close CleanOut using the X button in the top right corner instead of clicking the Done button, the messages in your trashcan and filing folder will be saved for your next session and nothing will be moved out of your Inbox.

[1] For the remainder of this section email and conversation can be used interchangeably.
[2] Some argue that two minutes should be the limit for Doing It now. Otherwise Defer it.

Delete (🗑)

If the conversation consists of just one message then Deleting will put it in the CleanOut trashcan and you will be presented with the next message.

If there are multiple messages in the conversation, the following dialog will appear:
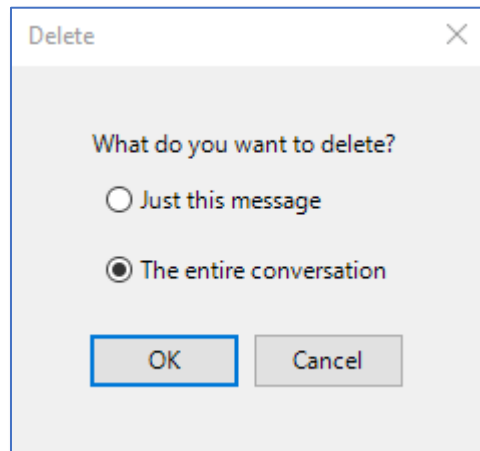
which gives you the option to delete just the one you are currently viewing or every email related to this conversation that is still in your Inbox. Obviously, as described in the earlier section on Leverage, you will get through your Inbox a lot quicker if you Delete the entire conversation.

File (📑)

When Filing a message, you can specify (#1) where to move it, what to file, what category (if any) to assign to it and (#2) what you want to delete:
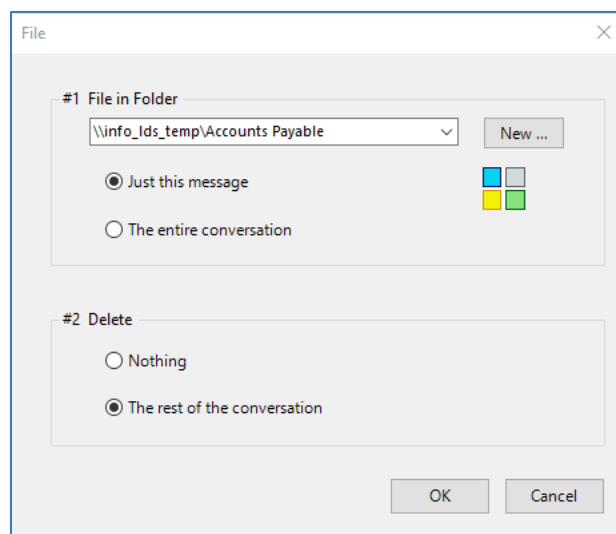
The first thing you will notice when you click on the *File in Folder* dropdown:
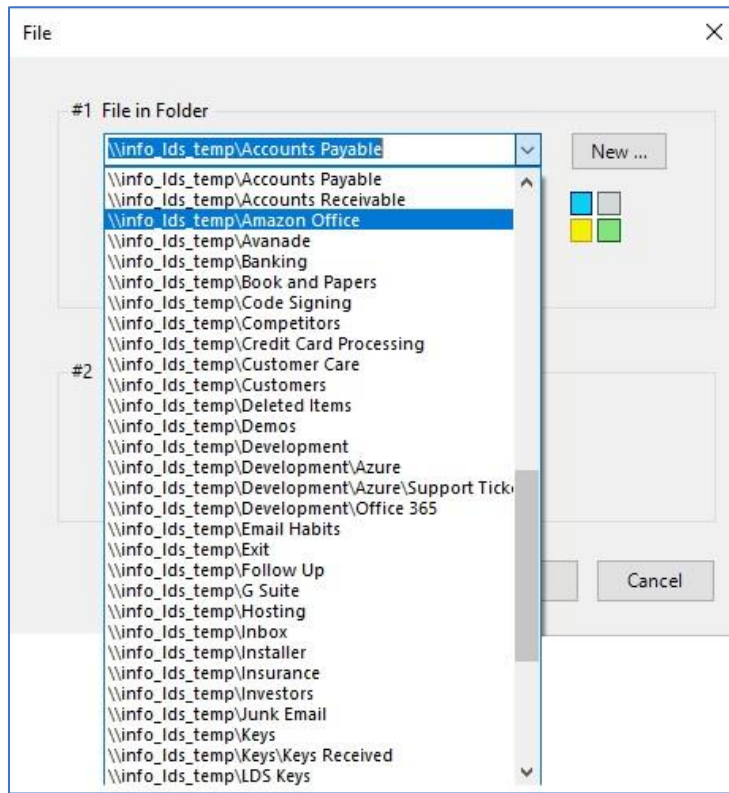
is that there is a <u>list</u> of folders, rather than a folder tree you would normally expect to see in Outlook. The reason is that scrolling a list is much faster than clicking to expand or close nodes on a folder tree, which is much more compact, and you can type a few letters into the text box to filter your results, as shown below:
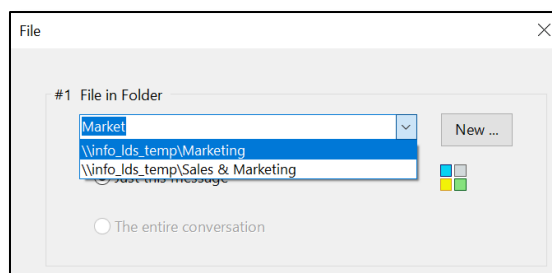
Obviously, this is a simple example but think how powerful that would be if you had a folder for 50+ customers and you wanted to quickly get to the one you want.

When you first install CleanOut, it will automatically populate the list of Folders to File in with whatever non-system folders (i.e. not Deleted Items, Inbox, Sent Items, Outbox etc.) it finds in your primary Inbox. You can modify this list by going to Settings→Folders→ and changing the Filing Folders. To make it faster for you to find the folder you're

looking for, you're encouraged to only select the Filing Folders <u>you are likely to use</u>. For example, if you have old folders for a customer or project that is no longer active then don't select them so that you won't waste your time seeing them on the list.

To save you even more time, CleanOut has an AI feature called **SmartFiling** which suggests the folder you may want to file it in based on the sender and keywords in the subject and body. For example, if each week you get an email with the subject "Weekly Sales Forecast" from your Sales Ops team and you always save it in the same folder, CleanOut will notice that and suggest it as the suggested folder in the future. This is another example of where the more you use it, the more intelligent it will become.

With the advent of almost unlimited mailbox size limits and better search capabilities many email users have stopped filing messages in a traditional hierarchical structure and instead file everything in a single folder and use the Search capabilities to find what they need. This approach is called **Piling** (as opposed to Filing). Often Piling advocates will use Outlook Categories to organize their email inside of this single folder. To facilitate Piling, click on the Categories button to select one or more Categories to assign to the email:
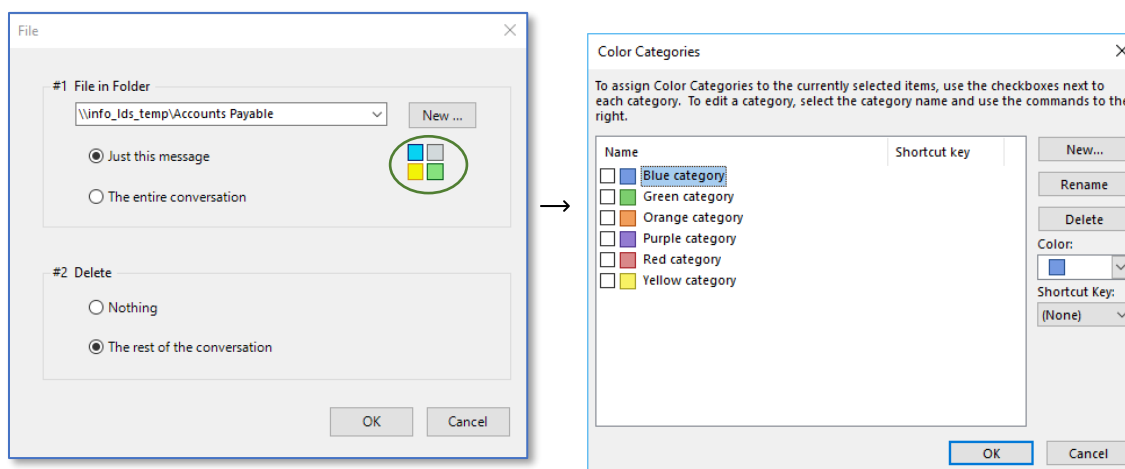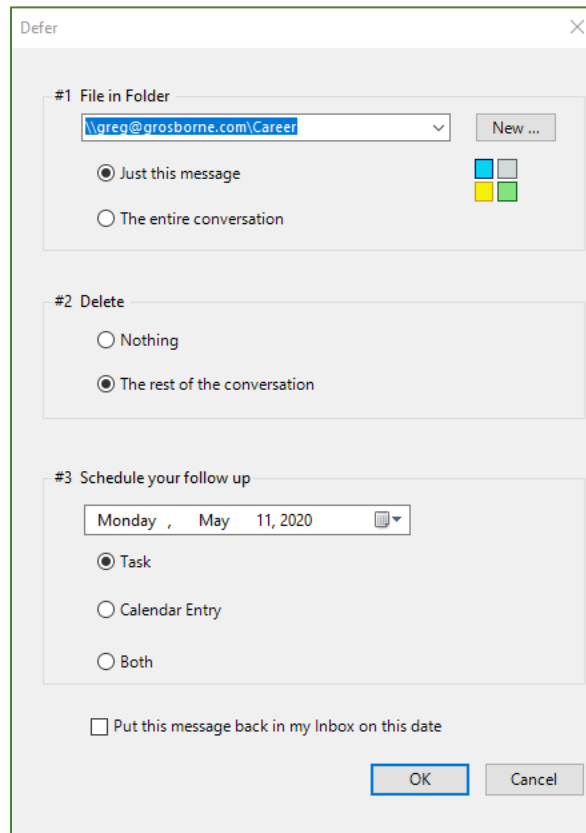

If there is no appropriate folder to save the message you are working on, click the New button to create one.

Finally, you have the option to File the entire conversation including responses you wrote which are in the Sent Items folder.

Defer (▥)

The Defer action is similar to File with the added ability (#3) to set a date and time to work on it and an option to "snooze" the message and move it back to your Inbox on that date:

Recognizing that many Outlook users utilize tasks management apps like Todoist, Microsoft To Do, Microsoft Planner etc. rather than the built-in Outlook Tasks, CleanOut gives you the ability to just create a calendar entry to block out time to defer the task.

Delegate (✉)

Likewise, Delegate builds upon Defer with the addition of a dropdown list (#1) of people you delegate to so that you can forward the message to one of your team.

You can update the list of people that you Delegate to by going to Settings→People. If the person you want to delegate it to is not someone you are likely to use again, click on Someone Else to be given the opportunity to type in an email address for that person.

Do It (⬈)

If the message is urgent or you have time to work on it now, click on Do It which will open the message in the standard Outlook message window (for CleanOut for Outlook) or the Office 365 or Outlook.com webmail client (for CleanOut and Outlook.com) where you can do anything you would normally do with a message opened from your Inbox. e.g. reply, forward or whatever.

Prev or Next (← or →)

If you don't want to do anything with the message at this time use the Skip Forward (→) command to leave it in your Inbox and go to the next message. Or if you want to go backwards use the Skip Previous (←) button.

CleanOut for Outlook also gives you the ability to skip forward and back to the next or previous conversation by holding down the CTRL key and pressing the left or right arrow buttons.

Navigation

At this point it is worth mentioning that there are four different ways to navigate your Inbox and to select Action commands, to choose from depending on what type of device you have and where you are. They are (in order of speed):

1. Mouse: point and click the buttons with your mouse or trackpad

2. Touch: if your screen is touch enabled CleanOut has been designed so you can select the Action buttons with minimal movement of your left thumb while holding the device in your right hand. As mentioned earlier, CleanOut and Outlook.com were designed especially for touch and works well in portrait and tablet mode:


CleanOut for Xbox in portrait mode

3. Keyboard: in a world of touch, swipes and pinches your keyboard remains one of the fastest ways to navigate CleanOut. Once you get used to it, you will find that you can zip through your email using your right hand with this cluster of keys:
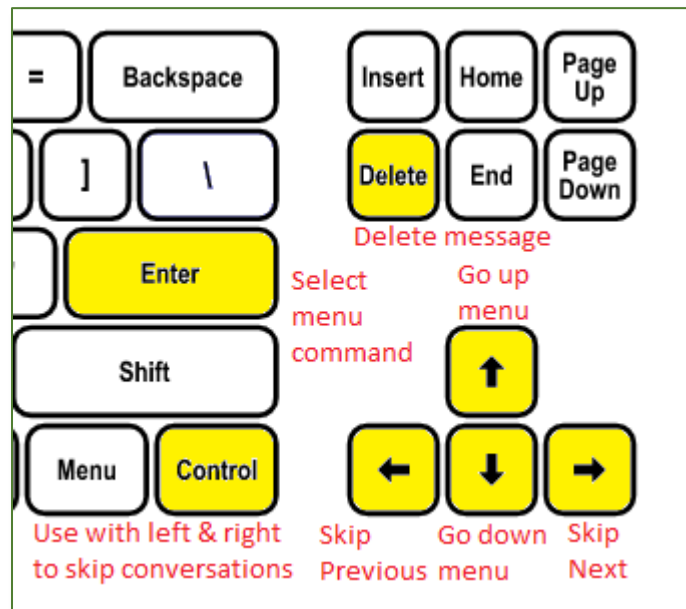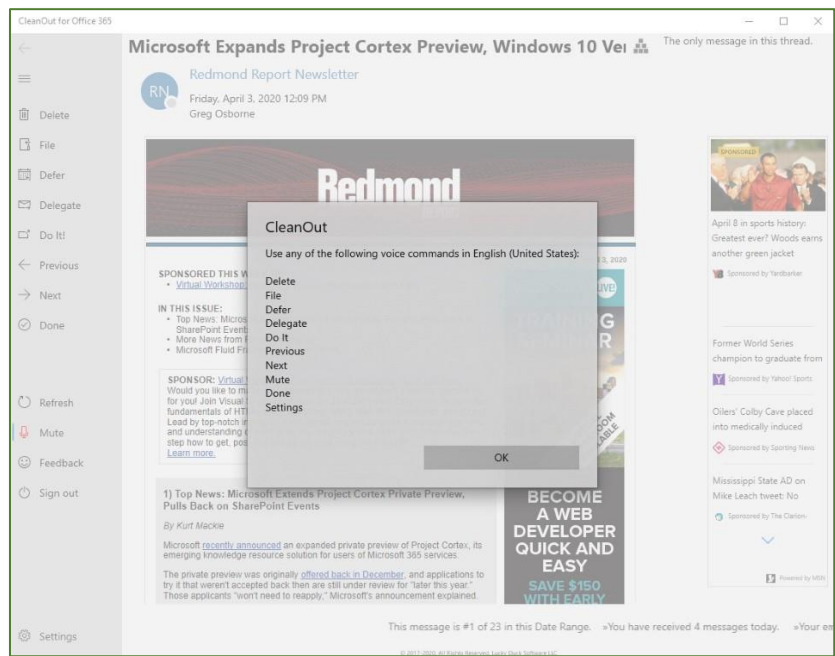

Controller: If you're running CleanOut on your Xbox One, the D-Pad and other buttons are as fast as using a keyboard on a PC:
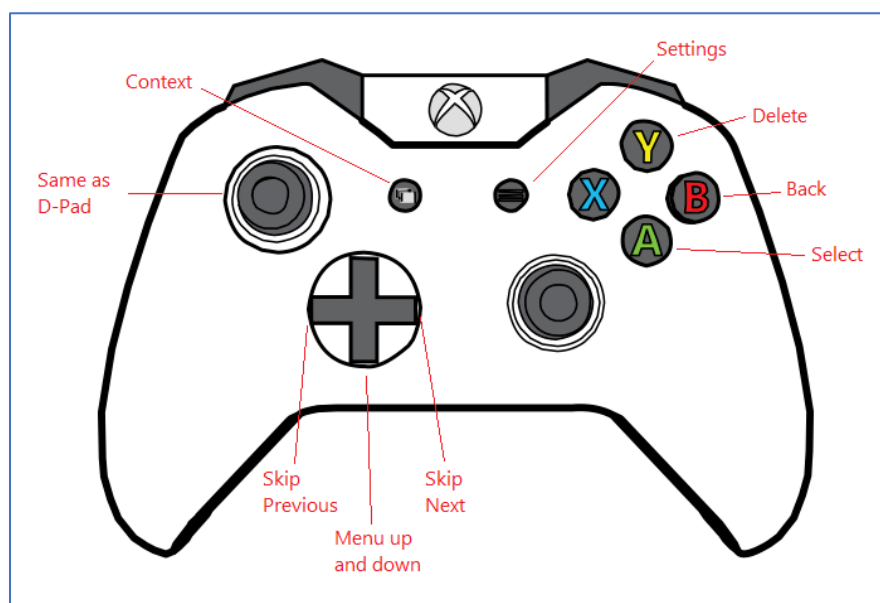
4. Voice Commands: giving verbal commands to CleanOut is the fastest and easiest of the four methods when you're in a quiet place that allows you to use it:

Refer to the App Commands section for more details about using Voice Commands.

App Commands

The App Commands allow you to change settings or perform certain actions. Note that not all actions are available in all versions of CleanOut.
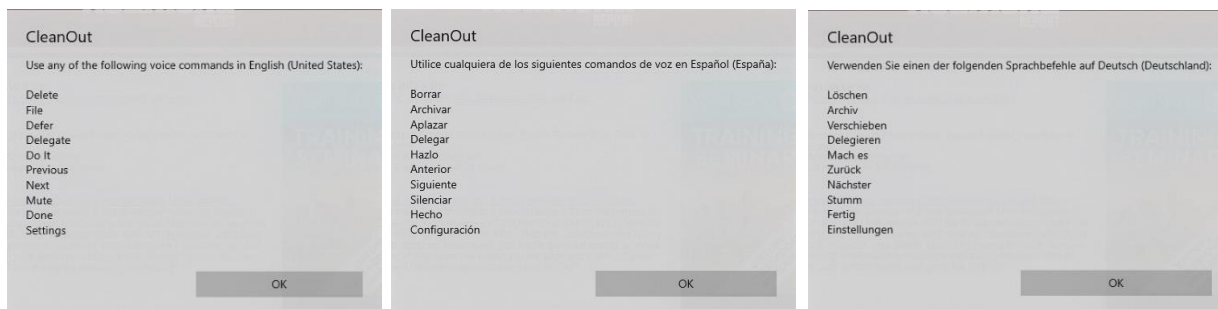
Zoom In and Out (⊕ and ⊖)

Enlarge or shrink the message being displayed. You can also use CTRL and + or – keyboard shortcut to zoom in and out just like in your favorite browser.

Refresh (↻)

Retrieve and score your newest messages.

Unmute/Mute (🎤)

Mutes or unmutes your microphone so you can use Voice Commands to quickly control CleanOut. When you first launch CleanOut it will be muted and unmuting it will display a dialog like this:

| CleanOut	CleanOut	CleanOut
Use any of the following voice commands in English (United States):	Utilice cualquiera de los siguientes comandos de voz en Español (España):	Verwenden Sie einen der folgenden Sprachbefehle auf Deutsch (Deutschland):
Delete	Borrar	Löschen
File	Archivar	Archiv
Defer	Aplazar	Verschieben
Delegate	Delegar	Delegieren
Do It	Hazlo	Mach es
Previous	Anterior	Zurück
Next	Siguiente	Nächster
Mute	Silenciar	Stumm
Done	Hecho	Fertig
Settings	Configuración	Einstellungen
OK	OK	OK

Note that CleanOut will try to use the language that you specified in CleanOut settings but if you do not have that Voice Package installed, it will revert to whatever language Windows is configured for. In Windows 10 or 11, go to Settings → Time & Language → Speech to check what Voice Packages you have installed.

Unfortunately, Voice Commands are currently not available in CleanOut running on Xbox due to the retirement of Cortana. The feature will be reactivated when an alternative is available.

Filters (▽)

As the name implies, Filters in CleanOut for Outlook, allows you to narrow down the emails that you see:
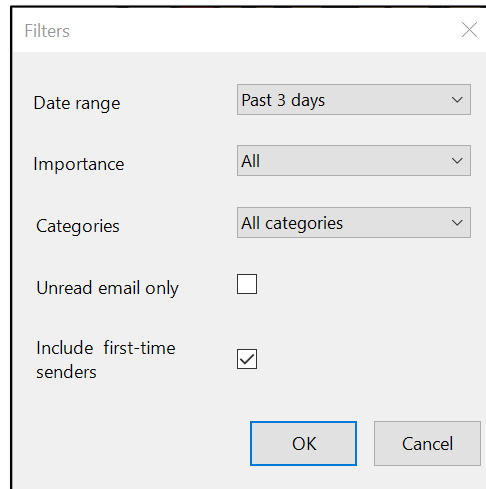
to a specific time-period, importance, category etc.

A good strategy for cleaning out your Inbox is to start with the most recent Date Range (i.e. Today) messages and work your way backwards, one step at a time, until you can see them all (i.e. Forever). If you have allowed your Inbox to grow into the tens of thousands of messages, using the Forever date range is an excellent way to find those "needles in a haystack" of important messages from your CEO from months/years ago that you may have missed.

Unchecking the 'Include First Time Senders' feature can save you time by filtering out messages from people you don't have an existing relationship with. Note, however, that you should not do this until after you have Scored All Emails otherwise there will be very few (or no) senders that qualify has having sent multiple messages.
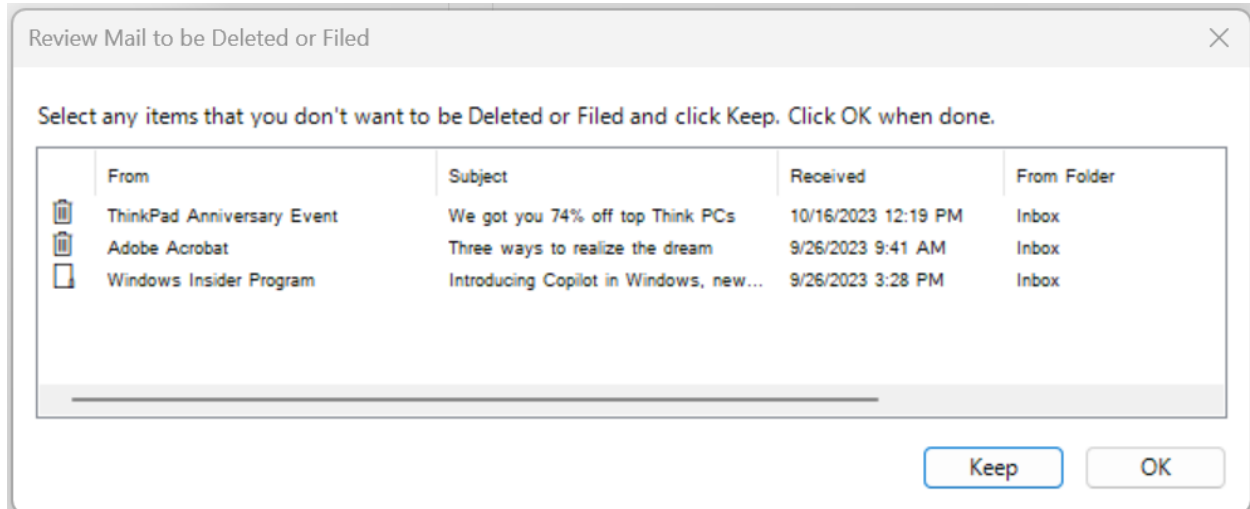

Feedback (☺)

Allows you to send feedback with praise or suggestions.

Review (⸌☰)

The Review feature in CleanOut for Outlook allows you to see what messages are queued to be moved and gives you an opportunity to change your mind:

The icon in the first column indicates whether the message is in the trashcan or filing folder. Clicking on the column headings will sort the list by that field, which is useful to find a specific message. Click the Keep button when you have finished selecting the messages that you don't want to be Deleted or Filed.

Done (⊘)

Use the Done command if you need to finish your session before you reach the last email, in the current date range. A dialog like the one below summarizes your achievements:
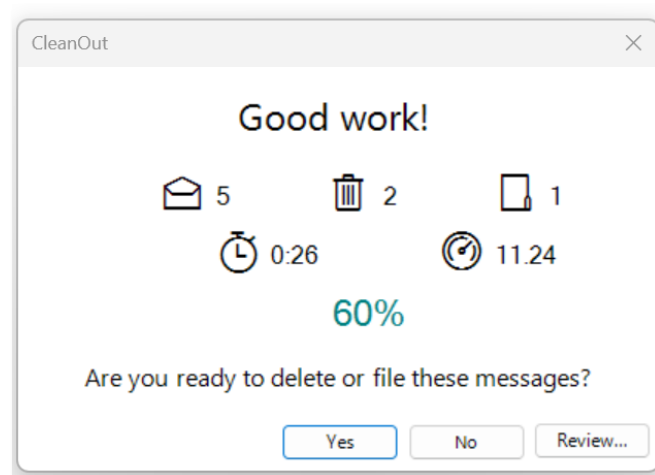
The summary shows you:

⌴ – the number of emails your read

🗑 – the number of emails you put in the trashcan

🗁 – the number of emails you put in the filing folder

⏲ – how long you spent checking your email

⌖ – how many emails you read per minute

% - the percentage of emails that you Cleaned Out of your inbox (by putting them in the trash can or filing folder)

In CleanOut for Outlook there is an additional option to Review the messages in your trashcan and filing folder which gives you a final opportunity to check what is about to be deleted or filed. See the Review command below for more details.

As mentioned previously, if you close CleanOut by clicking the close button (X) in the top right the messages in your trashcan and filing folder will be saved until your next session.
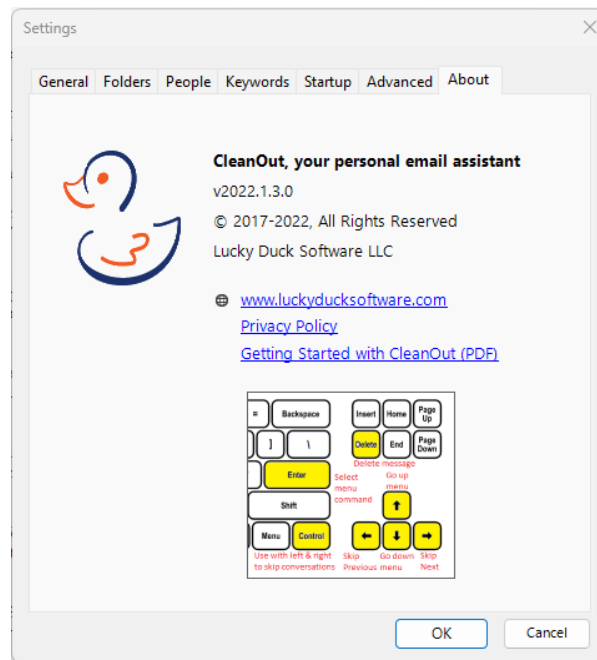
Logout (⏻)

Similar to Done except you will be logged out of Office 365 or Outlook.com, which will require you, or someone else, to log back in the next time you use CleanOut.
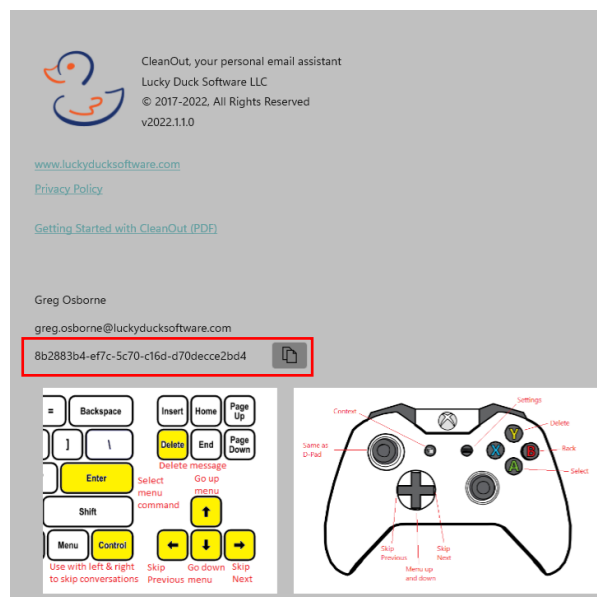
Settings (⚙)

About

The CleanOut for Outlook About page shows you what version of CleanOut you have installed and a handy reference to the keyboard shortcuts:
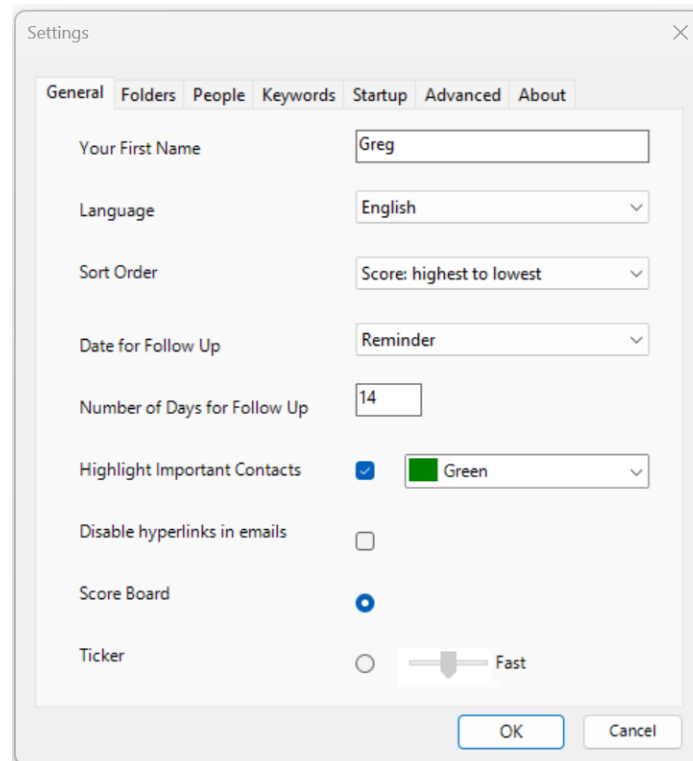

The CleanOut and Outlook.com apps have a code at the bottom of the About Page that can be copied to the clipboard to assist with troubleshooting:

Support will show you how to use the code if you need it.

General

Your First Name: used in various places throughout the app. [optional]

Language: chose from English (British), English (United States), German and Spanish (Spain). Exit and restart CleanOut for the new language to take effect.

Sort Order: this controls the order that messages are displayed in Open Mail app. Choose from:

- Score: highest to lowest

- Received Date: newest to oldest

- Received Date: oldest to newest

Date for Follow Up: there are two date fields in Outlook you can use to set a date for a follow up task – the Due Date and the Reminder field. This option allows you to select which one you prefer to use.

Number of Days for Follow Up: the default number of days after which you want to Defer a task or follow up with someone you have Delegated a task to.

Highlight Important Contacts: Never miss a message from an Important Contact by highlighting their emails in any Outlook folder as shown below:
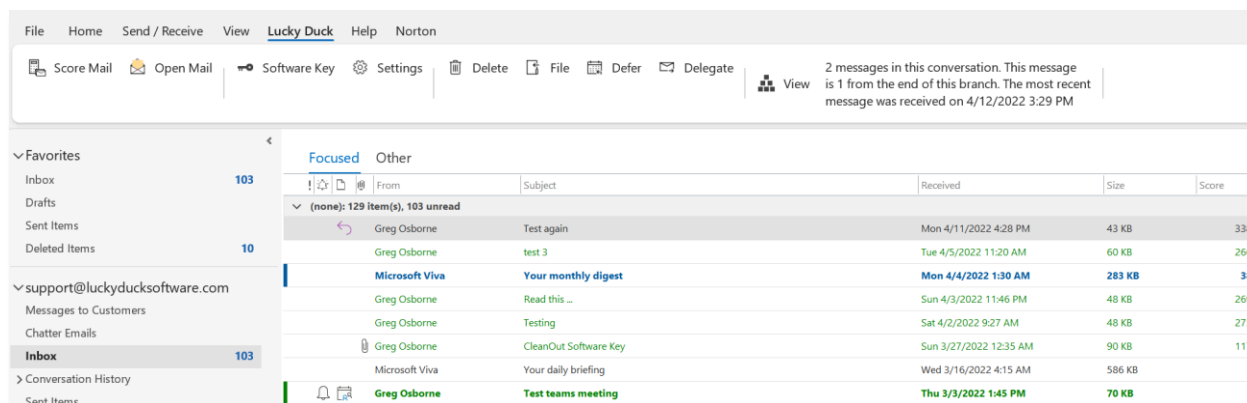
Experienced Outlook users know that you could also do this using a Conditional Formatting rule but this feature automatically does it for all of your Important Contacts in all folders, which is much easier to manage if you have a lot of VIPs.

Disable Hyperlinks in Emails: allow you to active hyperlinks in your messages. For security reasons hyperlinks are disabled by default but if you feel comfortable with the risk, you can activate with this setting.

Scoreboard: as mentioned in the Using CleanOut section, the scoreboard shows at a glance how far you are through your messages (in the given date range), how you're doing Cleaning Out your messages, how many messages you have put in the trash can / filing folder, and how long you have been using the app.

Ticker: turns on or off the marquee at the bottom of the page which provides useful information about trending messages, your mail volume, upcoming meetings etc., just like your favorite news show. Use the slider to change the rate at which the ticker scrolls across the bottom of the screen.

Connect to Microsoft Teams: will show you the Availability presence of your Microsoft Teams contacts and allow you to launch a chat by clicking on their picture. Note that selecting this option will add 10-15 seconds to the startup time for the app. [CleanOut only]

Folders
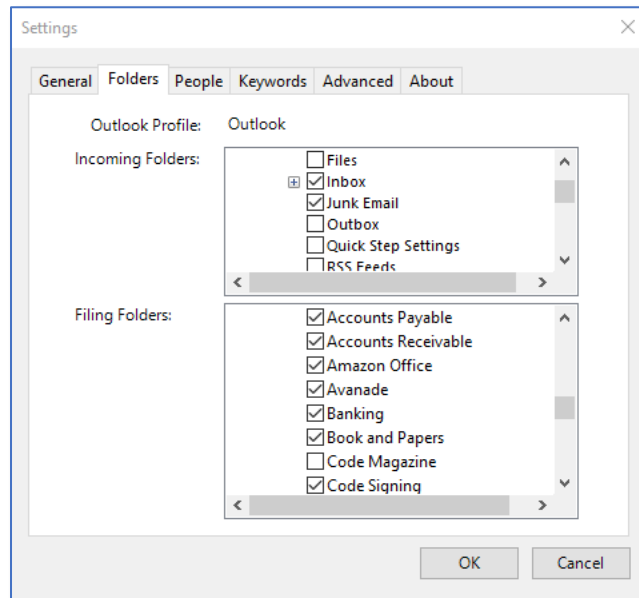
Outlook Profile: Outlook on Windows supports having more than one work area in which you can have multiple email accounts, address books, calendars etc. This field displays the active Outlook profile. [CleanOut for Outlook only]

Incoming Folders: these are the folders where new emails are received, across all your email accounts, which usually includes Inbox, Clutter, Junk Mail, Spam plus any other folders that you send new messages to, using Outlook rules. The ability to access Inboxes from multiple email accounts means that CleanOut acts as a Unified Inbox providing a single place to check all your email accounts.

Filing Folders: as mentioned earlier in the File section, this is the list of folders that you will be able to select from when you File a message, so only check the folders that you are likely to use.

CleanOut and Outlook.com only allow you to File messages in folders that are part of the email account whereas CleanOut for Outlook also supports filing of messages in Outlook Data Files (i.e. .pst files) on your local hard drive and Microsoft In-Place Archives in Azure. Please keep in mind that In-Place Archives are much slower than local folders because they are in the cloud.

People
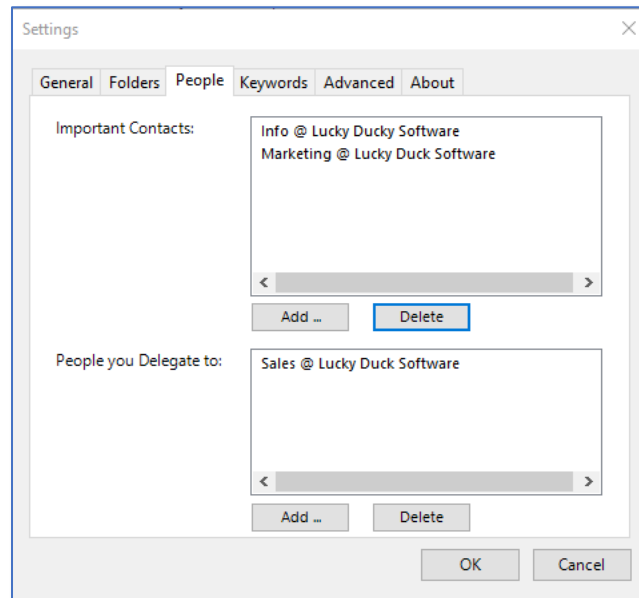
Important Contacts: messages from Important Contacts, or messages on which Important Contacts are cc'ed, are given extra priority when scoring.

People you Delegate to: this list is displayed when you Delegate a message providing a quick way to assign work to your team.

If you do not see the person you are looking for in your personal or organization's address book just type their email address and click the Add button, to add them to the list.

Keywords
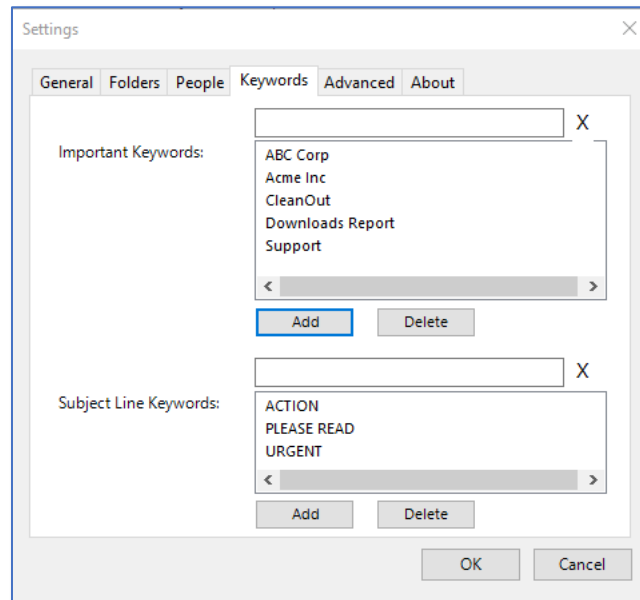
Important Keywords: messages will be given more priority if these words or phrases are found in either the body or subject of the email. Often you will use it flag messages from important customers, projects etc.

 Subject Line Keywords: is similar to above but just for subject lines. Use it for common phrases that people in your organization use to flag important messages. E.g. ACTION, PLEASE READ, URGENT etc.

Startup [CleanOut for Outlook Only]
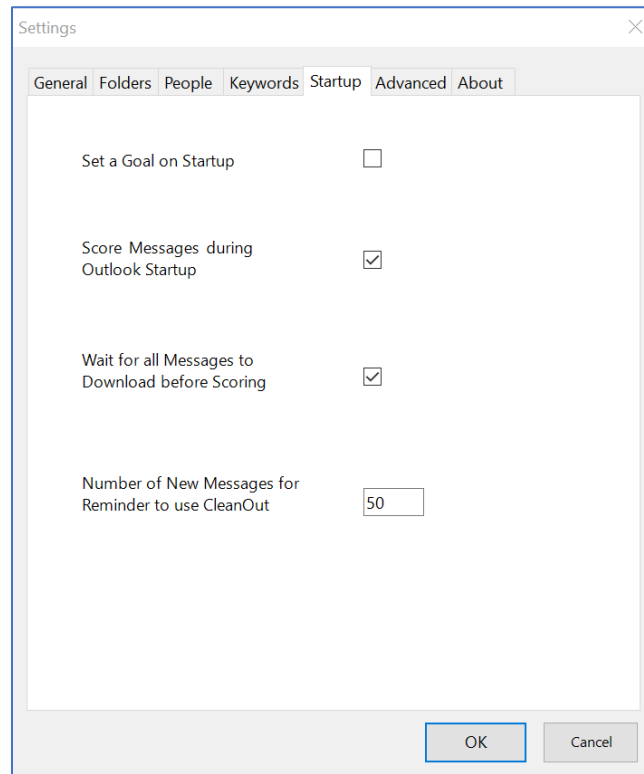
Set a Goal on Startup: make your CleanOut sessions more interesting and productive by setting a goal at the start of each session on how many messages you want to move out of your Inbox. You will get statuses in the ticker as you work towards your goal.

Score Messages during Outlook Startup: if you receive thousands of emails between Outlook sessions you can uncheck this option to avoid delays when Outlooks starts. It means, however, that you will have to score your messages manually (using the Score Mail option from the Lucky Duck ribbon) when convenient.

Wait for Mail to Download before Scoring: when you open Outlook on Windows, messages are downloaded from the server in no particular order, so it is recommended you check this option to have CleanOut wait until all messages have been download before it scores them. Otherwise, you won't have the full context of the conversation. [CleanOut for Outlook only]

Number of New Messages for Reminder to use CleanOut: reminds you to use CleanOut if you receive this many new messages, after opening Outlook. Set it to a very large number if you don't want to be reminded to use CleanOut. [CleanOut for Outlook only]

Advanced [CleanOut for Outlook Only]

Record Diagnostics if you need assistance troubleshooting an issue with CleanOut, these options allow you to record diagnostics at different points in the processing of your messages. Uncheck all of them if you are not having any issues, to improve performance.

Diagnostics you can choose to write the diagnostics to either:

> **Windows Event Log:** the Event Log is a central repository for informational and errors messages for all Windows applications. Note that you will need to have Administrator rights to use this feature.

Text File: if you are unable to use the Windows Event Log, an alternative is writing the log to a plain text file. You can view this text log in a text editor such as Notepad.

Message Cache helps you get through more messages in an OpenMail session by reading ahead to load email into memory so that they display quicker.

You can turn the Message Cache on in the Advanced tab in Settings, where you will also find several parameters to fine tune how it works. Using the example settings shown on the previous page, every 15 seconds CleanOut will check to see if your PC has been idle for at least 10 seconds. If so, it will read ahead and load another message into the cache. It will keep up to 50 messages in the cache. These settings are aggressive so experiment with them so it doesn't interrupt you while you work. Note that Message Cache is turn off by default.

Message Summary creates a concise 3-5 bullet summary of your conversation using ChatGPT 3.5. As discussed in an earlier section, this requires you to have an account with OpenAI. To allow CleanOut to communicate with ChatGPT, you will need to enter your secret OpenAI API key in this field. Your key value is masked in case anyone looks over your shoulder while you are on the Advanced tab. Note that the API Key is stored locally on your PC and the only time it is used, is to authenticate your access with OpenAI. If you decide that you no longer want to allow CleanOut to be able to create Message Summaries with your OpenAI account, go to this field, delete it with the backspace key and hit OK, which will overwrite the key.

Maintenance:

Run Analytics: once a week CleanOut analyzes the actions you took on your email to refine the predictive models used to determine which messages are the most important. For example, if you just made a lot of changes to your Important Contacts or Keywords running the analytics will recalibrate CleanOut based on the changes.

Reset Mail Stats: this option erases the statistics that CleanOut keeps locally on your device to either save disk space, to resets statistics if you're starting a new role with different email correspondents or want to simply want to start over.

Additional Features in CleanOut for Outlook

CleanOut for Outlook has some additional features, that are not found in the other versions, which are accessible from the Lucky Duck Ribbon in Outlook:
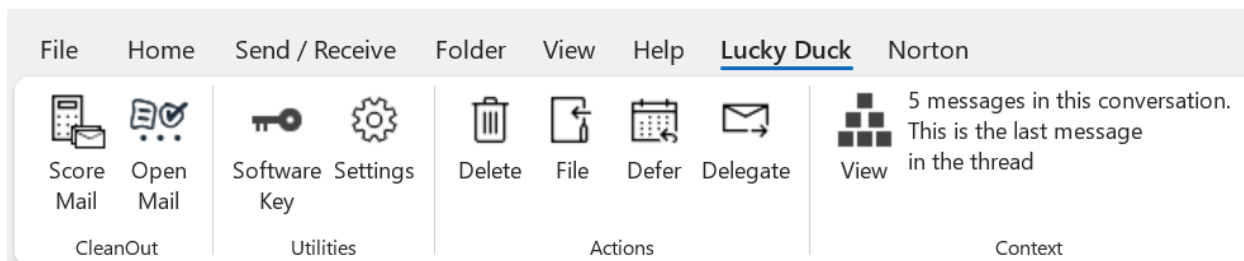
ScoreMail: CleanOut automatically scores your emails as they are received but you can score older messages that were not previously scored or rescore new messages using this option:
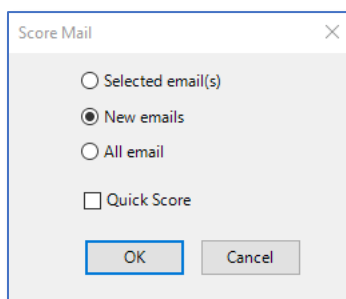

- **Selected email(s)** will score any messages that you have selected in your Inbox.

- **New emails** will score any emails in any Incoming Folders received in the last two weeks.

- **All email** will score every email in any Incoming Folder. Do this, when convenient, after you initially install so you can use any date range.

- **QuickScore** is a much faster method of scoring but not as accurate. Check this option if you have limited time.

> Note: When scoring a large number of messages, you may occasionally notice the status and progress bar freeze for exactly 30 seconds before continuing. This happens when the email server doesn't respond in time and CleanOut has to wait for it to 'time out' before being able to continue. Selecting Send/Receive→Work Offline may reduce the number of times that it freezes but usually won't eliminate it completely.

OpenMail: Launches the standard CleanOut app for checking your email, which has been the primary subject of this Using CleanOut section.

If you click on the OpenMail button soon after launching Outlook, but Outlook has not finished downloading your new messages (which means that not all messages have been scored), you will see the following message:
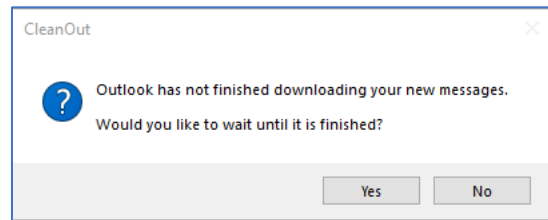
If you select Yes, this dialog will disappear and you will be notified as soon as Outlook has finished downloading all your new emails. If you select No, you will be shown your email but run the risk that you won't have the most recent message(s) in a conversation.

Software Key: displays information about the currently installed Software Keys including authorized email addresses and the expiry date. It also has a feature to search your Inbox for a new key so that you can install it.

If CleanOut is having trouble finding the email containing the software key, click on the email (containing the key) in your Inbox and then click on the Software Key button in your Ribbon.

Settings: allows you to change the product settings discussed in the previous section.

Action buttons and Context:

If you only have a few new emails to check or you're not comfortable having OpenMail select the emails for you, use the Action and Context buttons in the Ribbon to deal with them directly in your Inbox.

1. Use the Score column in your Inbox[3] to guide you to the emails you may want to look at first. You could even sort your email by Score by clicking on the column header:

2. Look at the Context to understand where it fits in and click on the Hierarchy button to view all messages in the conversation.

3. Click on the Action buttons to deal with a selected email(s). Please beware that unlike OpenMail, when you Delete or File a message using the Action buttons in the ribbon they are sent to the Deleted Items or filing folder immediately.
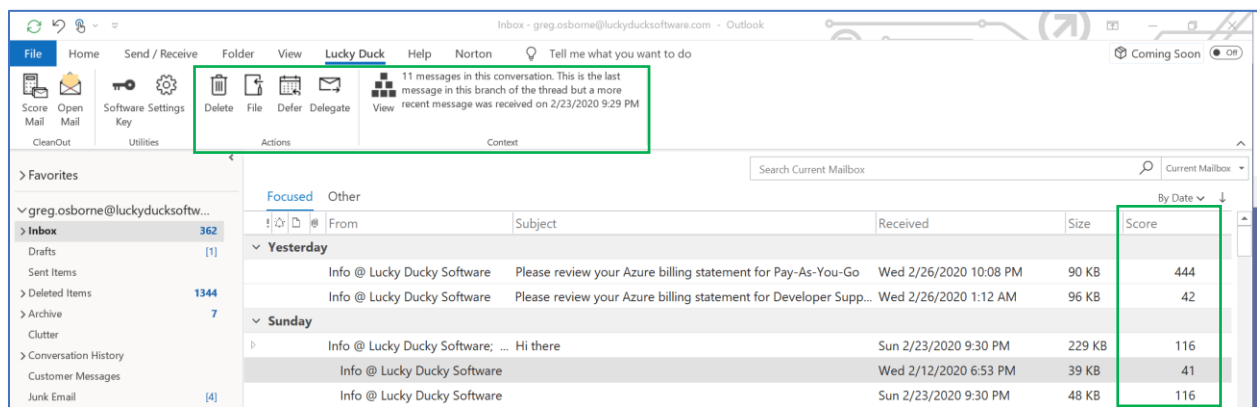
You may be asking yourself, what is the benefit of using these Action buttons over the regular Delete and Move buttons on the Outlook Home ribbon?   The answer is that:

- the CleanOut Delete and File buttons allow you to deal with entire conversations,
- the File button has SmartFiling, which allows you to assign categories and cleans up the rest of the conversation, and
- the Defer and Delegate buttons automate many more functions than you could do in an Outlook QuickStep.

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[3] If you don't see the Score column in your Inbox right click on the column headings, select Field Chooser, select 'User-Defined fields in Inbox' from the dropdown and click on Score.

Buying CleanOut for Outlook

If you have followed the advice in this guide, at the completion of your 30-day trial you will have noticed a remarkable reduction in the amount of time you spend managing your email and a greater sense of control over the related follow up items.

If this is the case, you are invited to turn your trial into a 12-month subscription by going to the Buy page on the Lucky Duck Software site:

Please note the "Add another email address to the key" button if you have multiple email accounts. Upon submission of the form and payment, you will be sent a new email containing the Software Key for your subscription. Click on the Software Keys button, described in the previous section, to install the new key. At this point congratulations are in order as you take command of your Inbox and achieve unprecedented levels of productivity!

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Summary

As you have no doubt realized by this point, Getting Started with CleanOut is much more than just installing a new app as it also involves learning a new way of checking your email.

It hopefully makes sense that you would not be able to realize such a drastic improvement in your productivity without changing anything. Therefore, part of the challenge is getting used to this new way of checking your email. The great thing is that you can switch back and forth, from your normal Outlook Inbox, to CleanOut at any time allowing you ease your way into it.

It's hard to believe today that drivers had issues with the automatic car transmission when it was first introduced. They were so used to selecting the gears and deciding when to change that giving it up (the control) was difficult for them. Today we can't imagine why it was ever a problem as it's so much easier, allowing you to focus more.
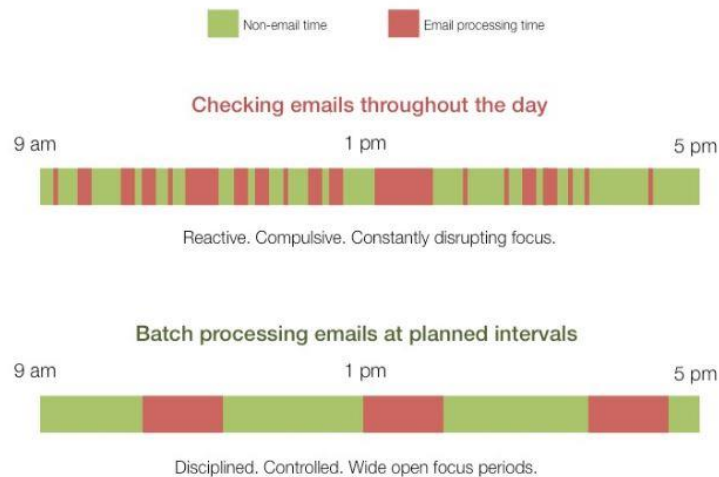
The same will be true with CleanOut and after a while you won't want to go back to the old way of doing email. Give it a try.

The result will be well worth it!

Appendix A – Glossary

Batching – checking your email less frequently throughout the day so that you can focus on productive tasks and avoid multitasking.

Conversation – all of the messages you have received or sent on a particular topic. They may or may not have the same subject line. See also *thread*.

Filing Folder – an Outlook folder where you save messages for reference or to deal with later.

Four D's – a time management approach for dealing with tasks or emails.

Inbox Zero – an email management approach, invented by Merlin Mann, where your goal is to have no emails in your Inbox.

Incoming Folder – an Outlook folder where you receive new messages.

Important Contact – an Outlook contact or an email address whose messages should be given higher priority.

Keyword – a phrase or word that may give an email higher priority.

Message – synonymous with email but also includes calendar invites, invite responses, email polls etc.

Piling – an organization approach where you store the emails you want to keep in a single folder and use search and categories to find them.

Profile – a feature of Outlook that allows you to have separate work areas for different email accounts.

Thread – a branch of a conversation. May be a tangent of the main topic.
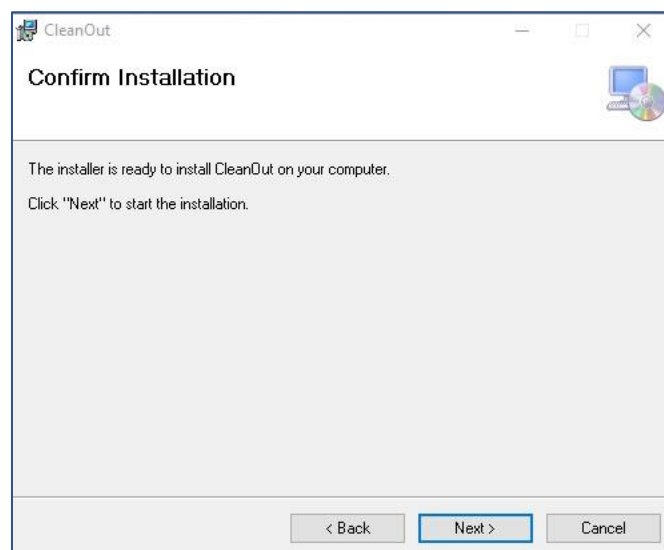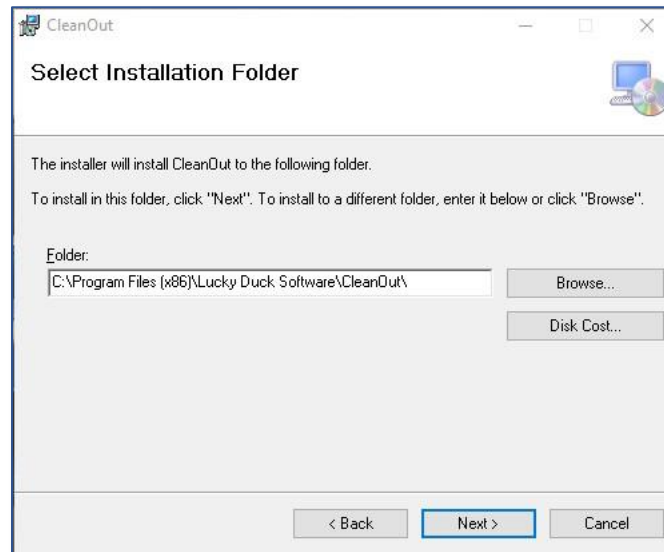
Unified Inbox – [virtually or physically] combines the new emails from more than one account in the same inbox.

Appendix B – CleanOut for Outlook Add-in Installer

You will see the following screens as you install the Add-in:
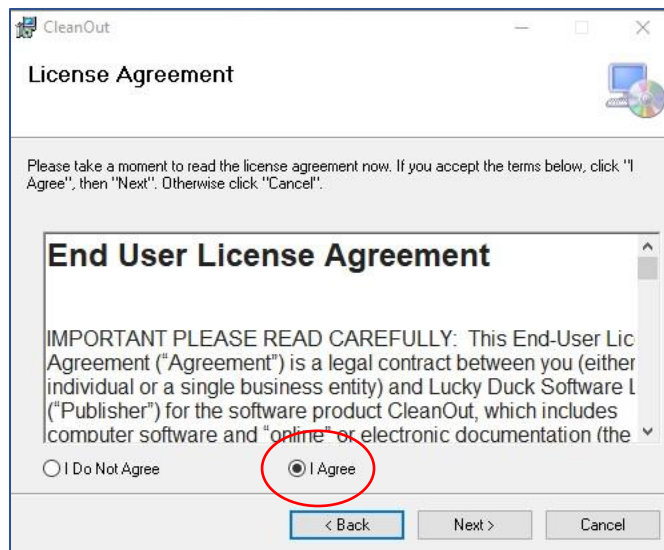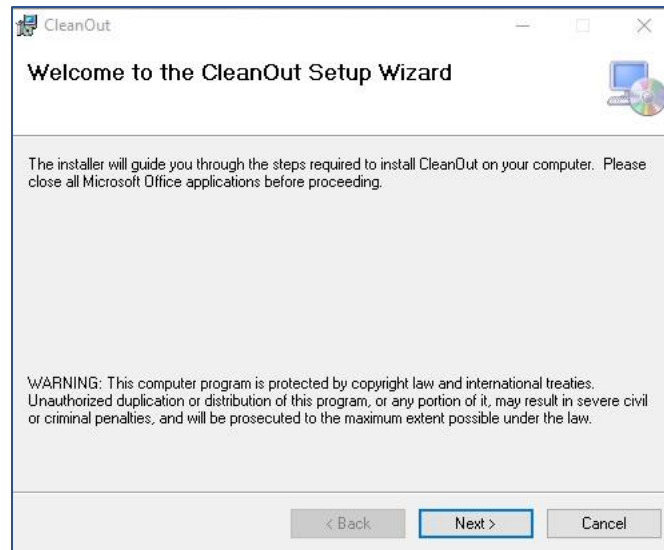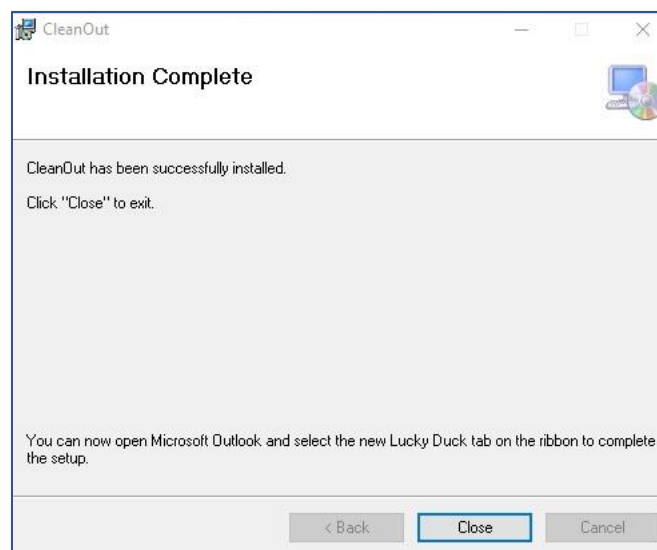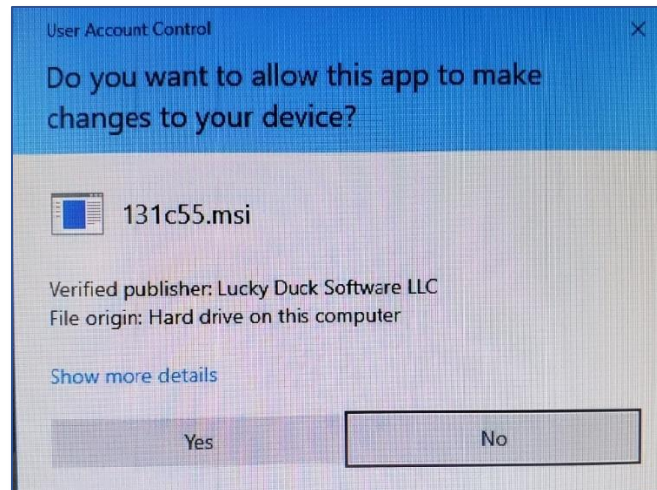
Appendix C – Launching the CleanOut Add-in for the first time

When you click on either the ScoreMail or OpenMail for the first time you will see the following Welcome screens:

If CleanOut cannot find a Software Key in your Inbox, go to the Lucky Duck website to get a free 30-day trial and click Next to try again. There is no need to reinstall.

When CleanOut finds your Software Key you will see a message like this. Click Yes to proceed.

CleanOut

? An email containing a software key with an expiry date of 3/28/2024 12:00:00 AM was found in your Inbox.
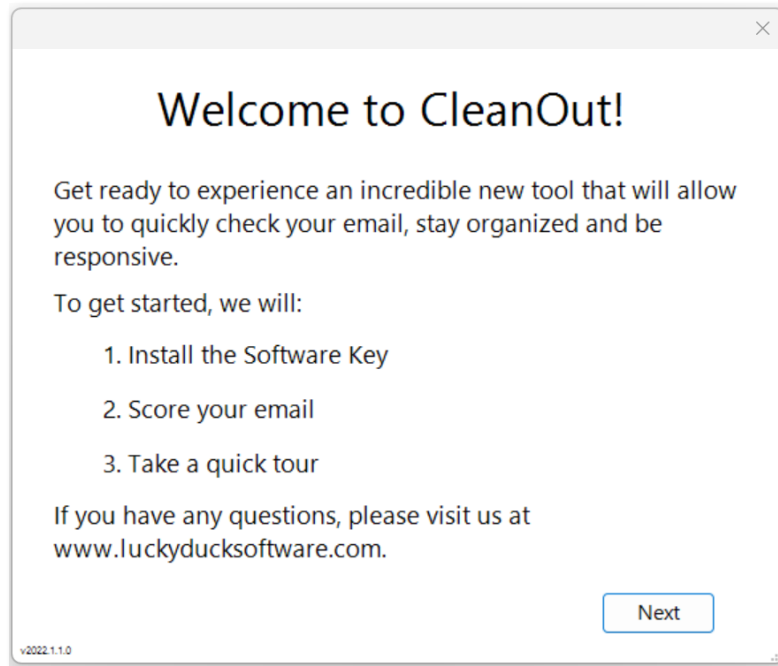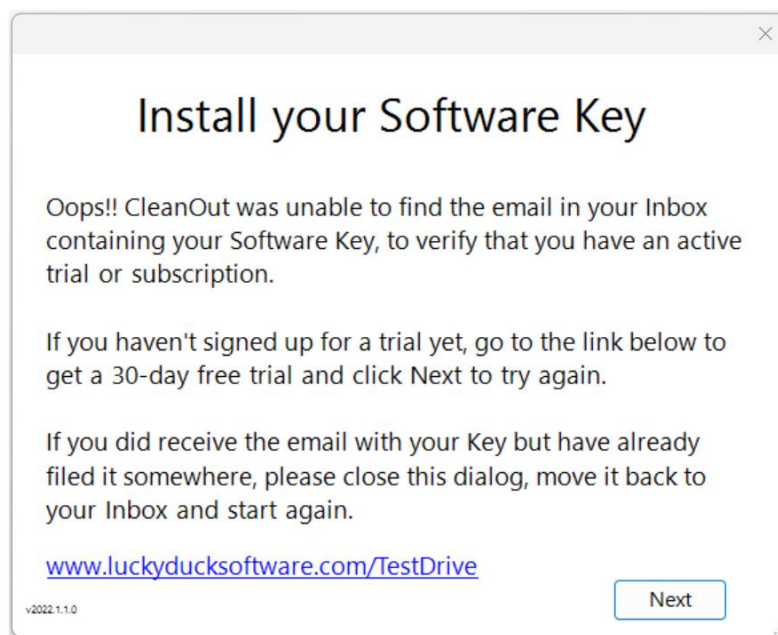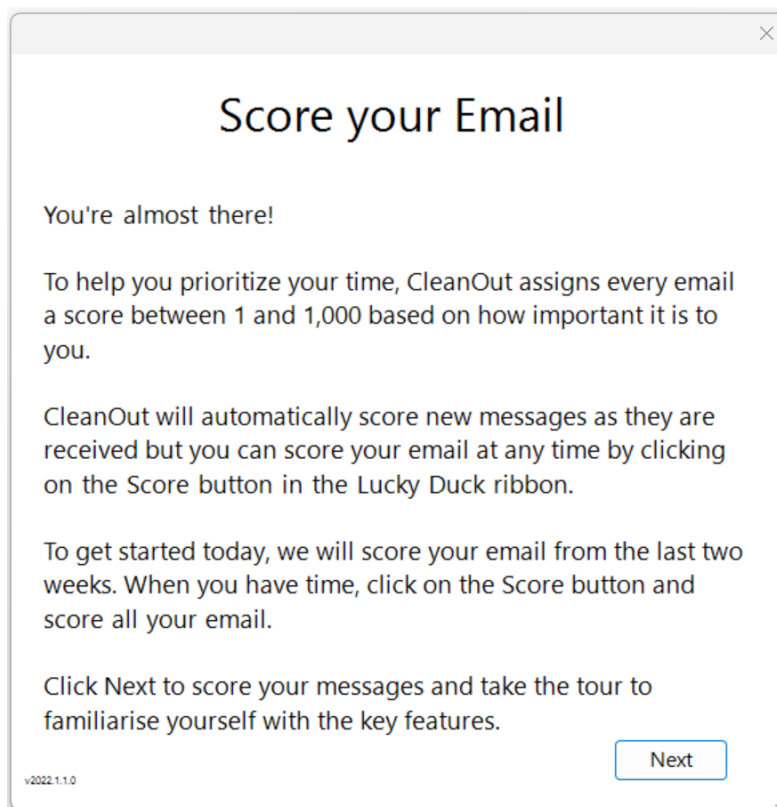
Would you like to install it?

Yes   No

Score your Email

You're almost there!

To help you prioritize your time, CleanOut assigns every email a score between 1 and 1,000 based on how important it is to you.

CleanOut will automatically score new messages as they are received but you can score your email at any time by clicking on the Score button in the Lucky Duck ribbon.

To get started today, we will score your email from the last two weeks. When you have time, click on the Score button and score all your email.

Click Next to score your messages and take the tour to familiarise yourself with the key features.

v2022.1.1.0

Next

CleanOut for Outlook initially scores your email for the last two weeks to get you started. When you have time, you should score your entire Inbox which could take a while if you have thousands of messages.

Note that during the initial setup CleanOut automatically selected your primary Outlook Inbox, on the current Profile. If you have multiple email accounts in Outlooks spread across one or more profiles, you can add them to the list of Incoming Folders from the Settings->Folders tab.

Appendix D – Launching the CleanOut apps for the first

The process of installing these two apps is similar so although the screen shots in this section are for CleanOut you can still follow along for CleanOut for Xbox.

Welcome to CleanOut!

You are about to experience an incredible time-saving tool that will allow you to manage your email in a fraction of the time it normally takes!

To get started, we will:

1. Connect to Office 365

2. Take a quick tour of the App

If you have any questions or issues, please check out the videos and knowledge base at www.luckyducksoftware.com.

Next

Connect to Office 365

The Microsoft Office 365 login page will ask you to enter your information and to accept the permissions that CleanOut requires. Here is a list of the permissions that will be requested and the reason that CleanOut requires that access:

Permission	Reason
Read your calendars	Allow you to create a reminder as a calendar event
Have full access to your calendars	Allow you to create a reminder as a calendar event
Read your contacts	So can specify who your important contacts are and who you delegate work to
Read your mailbox settings	To get a list of your Outlook categories
Read your mail	To be able to read, sort and present your messages to you
Read and write access to your mail	So you can forward a message to your team
Send mail as you	So you can forward a message to your team
Create, read, update and delete user tasks and plans	Allow you to create a reminder as a Task/To-Do item
Sign you in and read your profile	To access your Name and email address
Read all users' basic profiles	To get the photo of other users
Read and manage user information	To access your Name and email address
Initiate conversations and join meetings	Allow you to send a Skype for Business IM to the sender [of a message]
Read and Manage your Skype contacts and groups	So you can lookup the Skype/Teams presence indicator of the sender
Sign you in and read your profile [for Skype]	Access Skype/Teams information so you can see the presence status of the sender

Be sure to scroll to the bottom of the Microsoft Permissions page to click the blue Accept button.

Next