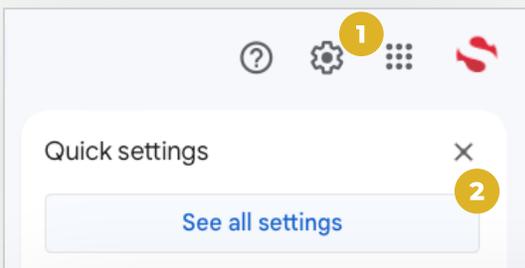




This guide includes everything you need to set up Gmail for the Stack Method™.

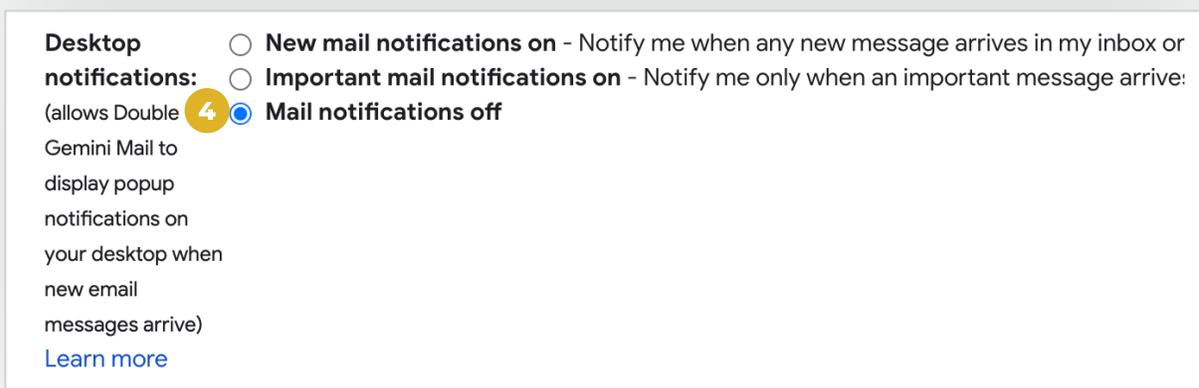
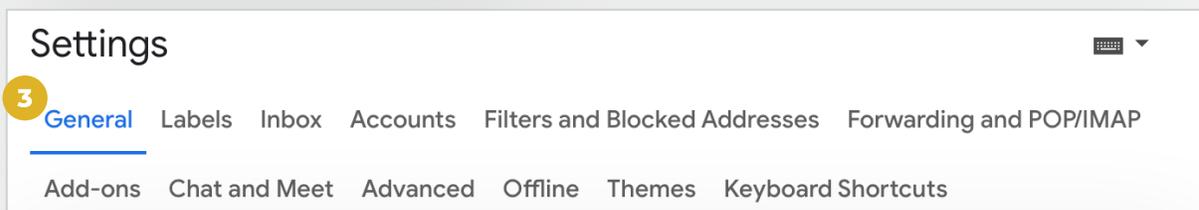
1 SET UP YOUR ENVIRONMENT

Turn off all notifications.



Notifications distract your thinking and limit your potential.

Turn your notifications off on your phone, desktop and other devices so you can focus on the work at hand.



Enable Keyboard Shortcuts.

Scroll down further on the General settings page until you see “Keyboard shortcuts”, then select “Keyboard shortcuts on.”



Remember to click on “Save Changes” at the bottom.



2 ENABLE YOUR READING PANE

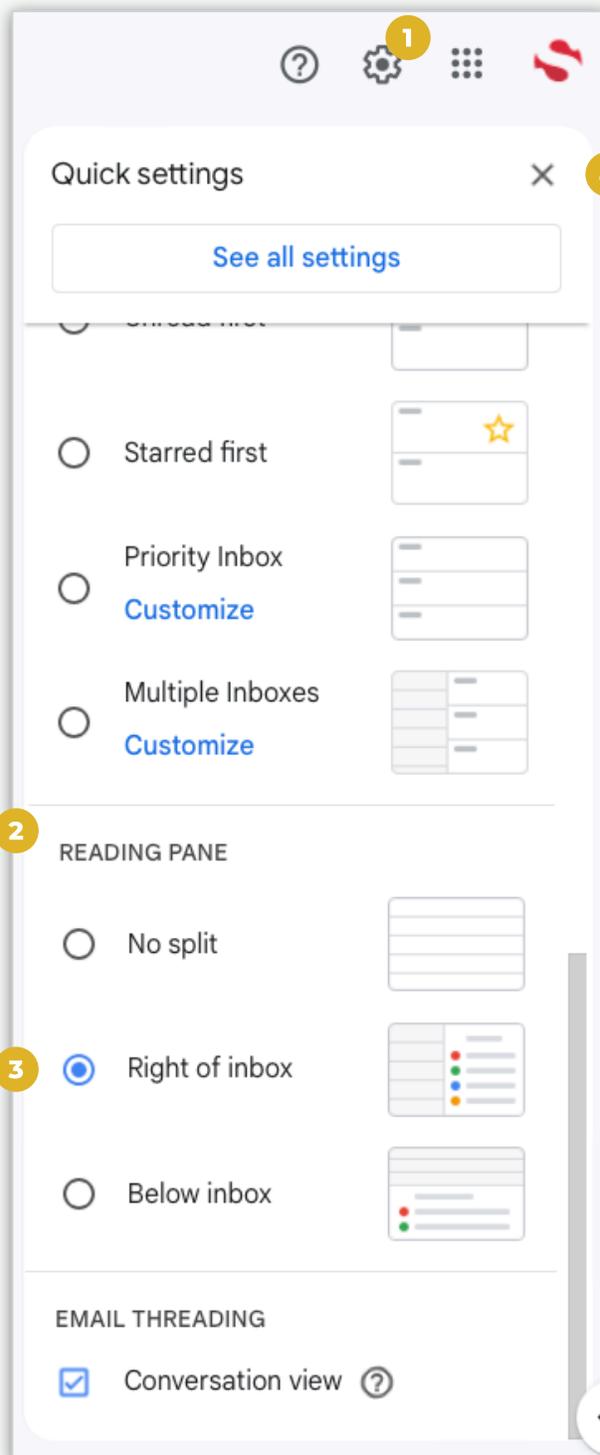
Set up your Reading Pane.

If you like the way that Outlook allows for an email preview panel, and would like to have that feature in Gmail - now you can.

The reading pane makes it easier to view and respond to messages.

We *recommend* that you turn your reading pane on to make it easier to process your emails.

1. Click on settings (you may need to go back to your inbox first).
2. Scroll down on the side panel until you see the *Reading Pane* section.
3. Select the option you prefer for now (you can always change it later.)
4. Close your settings window by clicking on the X and marvel at your new layout.



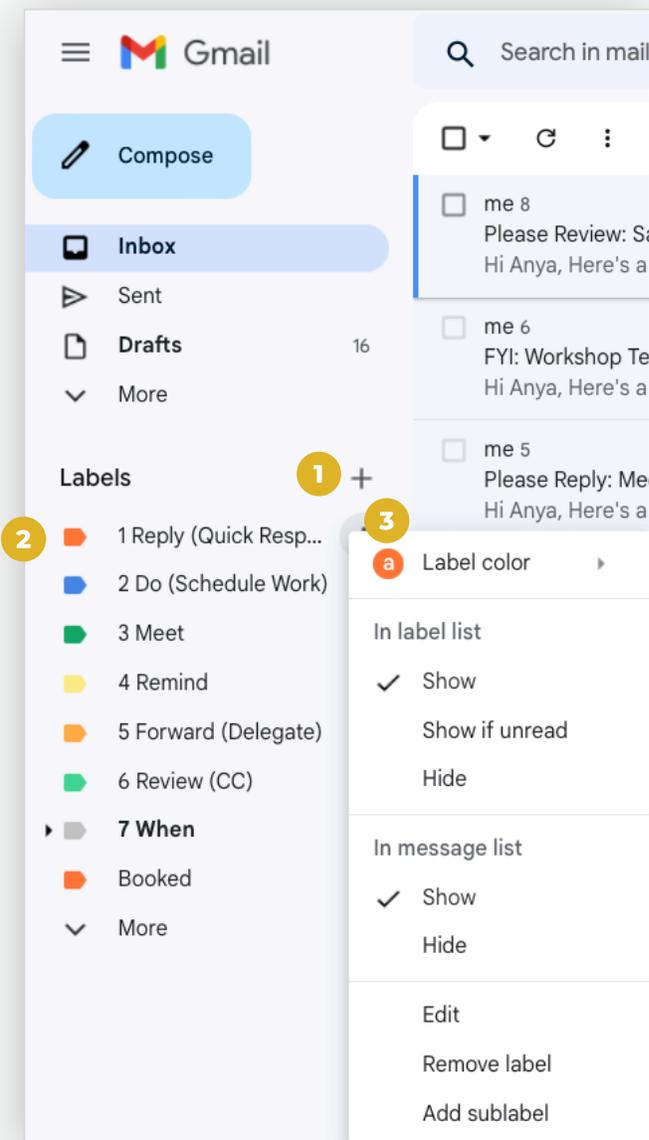


3 CREATE YOUR FOLDERS

Create your action folders.

It's time to create your action folders. Do not feel like you need to use our recommended set - feel free to experiment as you go along.

In your Gmail sidebar, click the plus next to Labels to add new labels. You can then create your action folders, we do recommend that you have at least *Do* and *Remind* folders and you number them. Then click the three dots next to your labels and choose your label colors.



ACTION FOLDER EXAMPLES

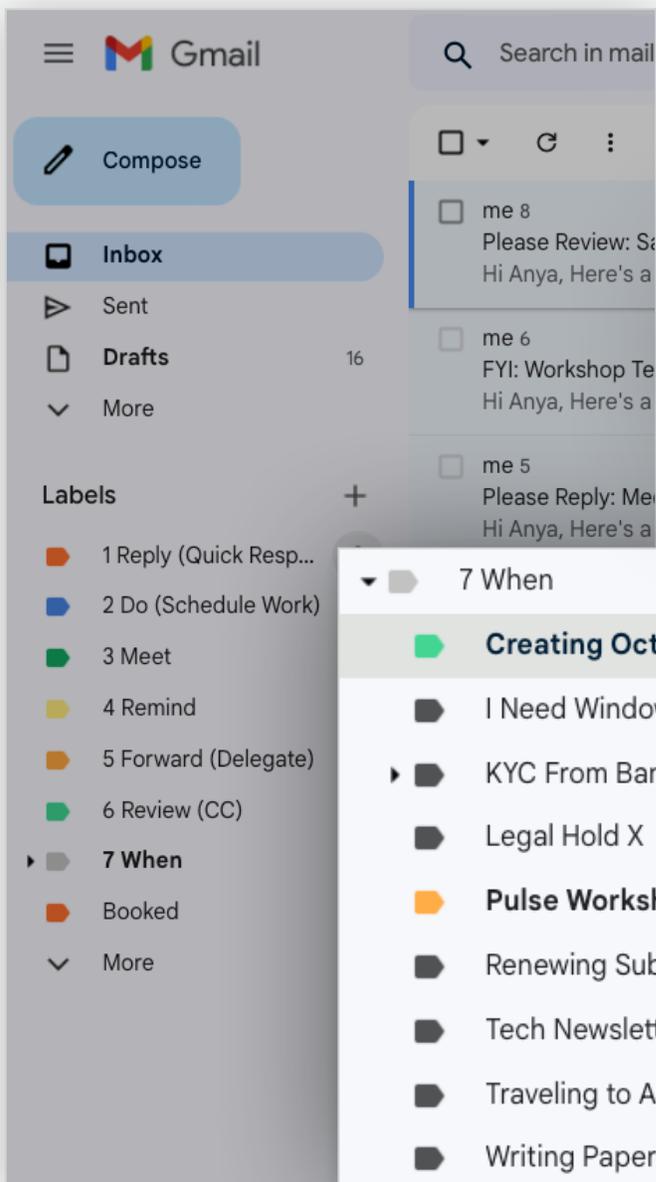
- Invoice
- Revise
- Trade
- Sign
- Schedule
- Plan
- Transfer
- File
- Reschedule
- Read
- Pay
- Delegate
- Approve



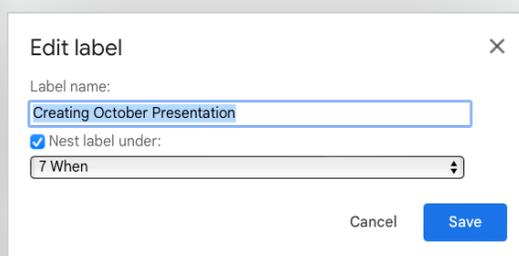
Create your When folders.

When folders are for active projects or topics that you want to quickly and easily reference.

Try to limit your When folders to just the most important folders you need.



Start by moving folders you currently use to the **When** section or create new ones for things you know you need.



(Don't use numbers to start the name of the folder).

Do this by clicking the three dots to the right of a folder name to move it.

When moving or creating folders, make sure to check the box and select your **When** folder to place it in the right location.



4 SCHEDULE STACKING TIME

- Create recurring calendar entries.

Blocking out time to Stack helps you build the habit and ensures that you email when it's time to email, and do your other work when it's time to do that work. To set up recurring calendar sessions, follow the steps below:

1. Click on your calendar

It's easiest if you click on the date and time (or approximate time) you would like to create an entry.

2. Title your calendar entry

We recommend you label your longer session as "Stack: Folders" and your shorter sessions as "Stack: Inbox".

"Stack: Folders" will be your time slot to empty your inbox into your action folders and work through your action folders. This will typically be a longer 1 hour session.

"Stack: Inbox" will be a shorter time slot to work through your inbox and answer emails directly out of your inbox.

These fields are located under the main menu bar on the left side. Save the calendar entry.

3. Set your event to recur

Double-click the calendar entry. Below the date and time, click on "Does not repeat". In the drop down menu, set it to recur by selecting "Every weekday (Monday to Friday)."

Stack: Folders

Jun 25, 2020 10:00 to 11:00 Jun 25, 2020 Time zone

All day **Does not repeat**

Does not repeat

Daily

Weekly on Thursday

Monthly on the fourth Thursday

Monthly on the last Thursday

Annually on June 25

Every weekday (Monday to Friday)

Custom...

4. Admire your calendar!

This is also a good time to check and make sure you saved the correct date/time. If you notice that the date or time is incorrect, you can click and drag this block to the correct date and time, or you can edit this by double clicking on the entry.



5 PRACTICE SCHEDULING DO'S

Schedule your effort emails in your calendar.

Scheduling “Do’s” (effort emails) will help you process the remainder of your emails much faster and reduces the feeling of overwhelm by helping you proactively deal with these types of actions.

From ▾ Any time ▾ Has attachment To ▾ [Advanced search](#)

Charlie Tysse Aug 12
Status Update: TOPIC
Hi Anya, Here's a quick status update on using ... ☆

Kenny Smith Jul 29
Please Forward: Scope of Work
Hi Stack, Could you please forward Scope of W... ☆

1-3 of 3 <

- Mark as unread
- Mark as important
- Add star
- 3 Create event
- Filter messages like these

4 DO: Status Update: TOPIC Save

Cancel event creation

Sep 2, 2022 12:00pm to 1:00pm Sep 2, 2022 Time zone

All day Does not repeat ▾

Event Details [Find a Time](#) 5

Today < > Friday, September 2, 2022 Day ▾ All guests ▾ ?

FRI 2

GMT-04

12 PM

1 PM

Start by selecting the message you want to schedule time for, then click the three dots on the menu bar and then select *Create event*. From there, add the words “DO” at the beginning of the *Event name* and select the time and date using the “Find a Time” section.

Once done, add a “Booked” label to note that it’s scheduled.

From ▾ Any time ▾ Has attachment To ▾ [Advanced search](#)

Charlie Tysse Aug 12
Status Update: TOPIC
Hi Anya, Here's a quick status ... **Booked** ☆

Kenny Smith Jul 29
Please Forward: Scope of Work
Hi Stack, Could you please forward Scop... ☆

1-3 of 3 < > ≡ ▾

Label as:
Book

Booked

"Book" (create new)



6 IT'S TIME TO ARCHIVE

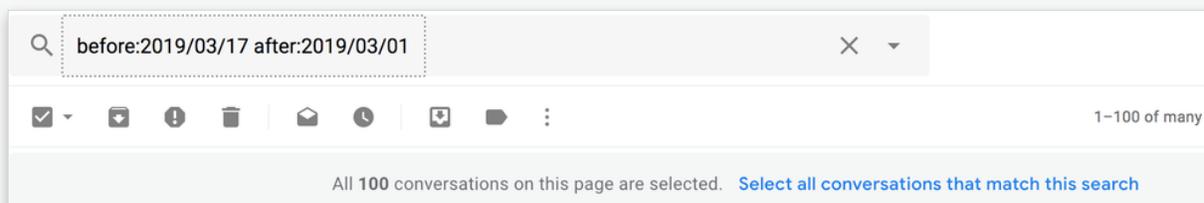
Clear old emails out of your inbox.

A cluttered inbox will lead to a cluttered mind!

To start out on the best foot, you'll want to archive all emails older than three weeks. The best way to clear old emails out of your inbox in Gmail is to archive them a year at a time. These emails can always be found in your "All Mail" folder.

Go to the Gmail search bar and enter "before: YYYY/MM/DD after: YYYY/MM/DD".

Replace the "YYYY/MM/DD" with the dates for the emails you want to archive. See image below as an example.



In the example above, we've selected three months worth of emails for a given year as Gmail can have trouble archiving too many emails at once.

We recommend archiving no more than one year of emails at a time.

Once you hit the enter key, all of your emails within the requested time frame will appear. Above your list of emails, there will be a checkbox. Select this to highlight all emails on your screen and you will then see the image below appear above your list of emails:



Click on "Select all conversations that match this search", then click on the Archive button to the right of the checkbox:



Remember, archiving means you can still search and find these emails by using the search bar, except they will no longer be taking up space in your inbox.

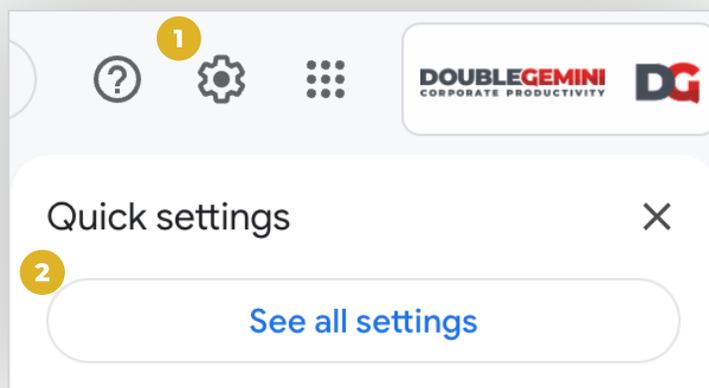
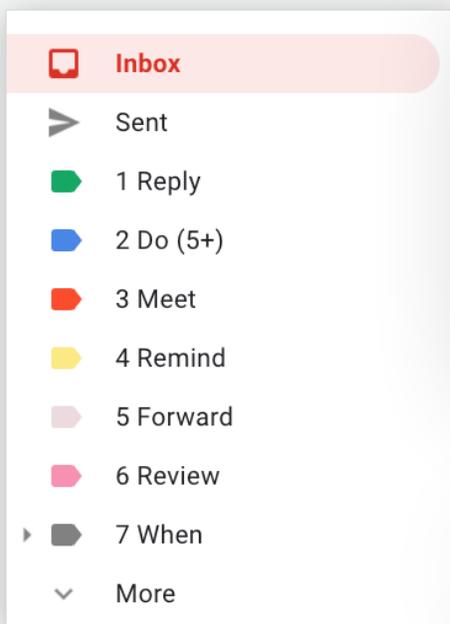


7 CLEAN UP YOUR LABELS

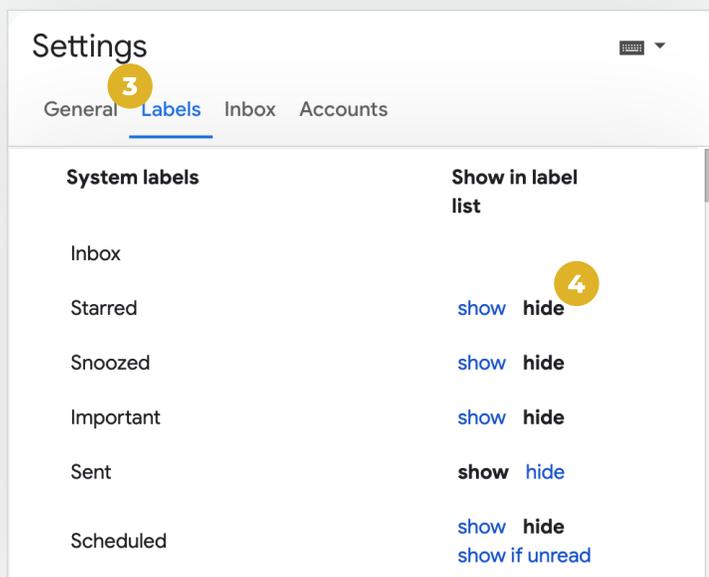
Remove unnecessary labels.

Unnecessary labels on your sidebar clutter your mind and distract you from focusing on the things that matter. We recommend keeping a very clean and simple sidebar by hiding anything you don't need.

To edit or hide your current labels, click on the cog icon in the top right of your inbox, then click on the "See all settings" button.



Once in Settings, click on Labels to view your full list of labels.



From here, you can show and hide labels easily by clicking on "hide" for the labels you don't want to see.

Hiding labels won't delete the label or any of your emails with that specific label, it will put them under the "More" menu on the left sidebar (as seen in in the first image above).



8 PRACTICE SETTING UP FILTERS

Set up your filters.

Filters keep unwanted emails out of your inbox. We highly recommend you use this feature to get at least your newsletters, receipts, and other unwanted emails out of your way and into your Review folder, or archive.

Select an email you want to filter, then click the three dots and choose the option *Filter messages like these*. Adjust any additional filter criteria and then hit “Create Filter.” Choose options appropriate to your situation then hit *Create Filter*.

The screenshot illustrates the steps to create a filter in Gmail. It shows an email list with a selected email from Goodreads. A context menu is open, highlighting the 'Filter messages like these' option. Below, the filter criteria are set to 'From: no-reply@mail.goodreads.com'. The filter actions are configured to skip the inbox, mark as read, star it, and apply a label. The 'Create filter' button is highlighted at the bottom right.