

# OUTLOOK 2007: **Email** MANAGEMENT TOOLS

## DO YOU LIVE IN YOUR INBOX?

Are you:

1. Easily distracted when a new email arrives?
2. Checking your email immediately upon arriving at work?
3. Checking your email before you leave for work?
4. Checking your email when you first get up in the morning?
5. Taking your cell phone to bed with you?

You need to take control of your inbox. One way is to use the “Four D’s” to help you efficiently process your email.

1. If the email isn’t important, **delete** it.
2. If the email can be taken care of in less than two minutes, **do** it.
3. If the email isn’t for you, or if you can, **delegate** it.
4. If you need to take care of the email or use for reference, but it will take longer than two minutes, **defer** it.
  - a. *Reference emails* contains information you need later. Move it to a reference folder.
  - b. *Action email* contains information you must have to complete an action. Convert it to a To-Do, Calendar, or Contact item, as appropriate.

Schedule about 10 minutes at the start of your day to plan your day. Check your email following the “4 D’s”, and check your To-Do Bar for items due that day and later in the week.

## DRAG AND DROP MESSAGES TO CALENDAR, TASKS, CONTACTS

You receive an email that needs to be converted to an appointment, task or contact. Here’s how you do that.

### Convert to an appointment

1. Select the message to be converted to an appointment and drag it to the **Calendar** button on the left navigation pane. A new appointment view opens with the message information added.
2. Make any changes to the appointment and **Save & Close**

### Convert to a task

1. Select the message to be converted to a task and drag it to the **Tasks** button on the left navigation pane. A new task view opens with the message information added.
2. Add start and due dates, and make any other changes to the task. You may even assign the task to someone else. When done, **Save & Close**.

### Convert to a contact

1. Select the message to be converted to a task and drag it to the **Contacts** button on the left navigation pane. A new contact view opens with the message information added, usually name and email address.
2. Add other information as needed and **Save & Close**.

## COLOR-CODE INCOMING MESSAGES

Letting Outlook color-code emails can greatly improve your productivity by focusing your attention on the right emails. Here are a few simple tips you can use to achieve this.

### Color messages sent only to you

If you don’t respond to a message that was addressed only to you, then no one will. Here’s how to highlight these messages so you don’t miss them.

1. From your Inbox, select **Tools > Organize** to display the Organize pane.
2. Click Using Colors.
3. Click the **Turn on** button next to **Messages sent only to me now appear blue**. *NOTE: You may find that this also colors email newsletters.*

### Color messages sent by your boss, co-workers, project team members, etc.

1. Select a message from your inbox from someone you wish to color-code.
2. Select **Tools > Organize** to display the Organize pane.
3. Click **Using Colors**.
4. Make sure the drop-down next to Color Message reads **from**.
5. Choose a color and click **Apply Color**.

## Advanced Color-code Formatting

For color-coding several people at once, color-coding messages with specific words, color-coding messages with attachments or high importance, etc.

1. From your Inbox, select **Tools > Organize** to display the Organize pane.
2. Click **Using Colors and Automatic Formatting...**
3. Click **Add**.
4. Enter a name; e.g., **Co-workers**.
5. Click **Font...** and select a font color, font style, font size, etc. Click **OK** when done.
6. Click **Condition** to display the Filter screen.
7. Click **From...** and select co-worker names. When done click **OK**.
8. Click **OK** twice more to return to your folder.

*NOTE: The **More Choices** tab allows you to color-code messages with attachments, or high importance messages, and more. The **Advanced** tab allows you to use fields in your criteria.*

## Delete Color coding

1. From your Inbox, select **Tools > Organize** to display the Organize pane.
2. Click **Using Colors**.
3. Click **Automatic Formatting...** to display the list of color codes.
4. Select the relevant item from the list and click **Delete**.

## FLAGGING MESSAGES FOR FOLLOW-UP

If you receive a high volume of messages, it is easier for important messages requiring your attention or follow-up to get lost or overlooked. Outlook lets you flag messages for follow-up and set reminders. Here's how:

### Flag an email with or without a reminder

1. Right-click an email and select **Follow-up**. Choose when you want to follow-up.

*NOTE: The **Custom** and **Add Reminder** choices take you to same dialog box. You can set more specific Follow-ups and manually add a specific reminder.*

2. Select a Follow-up. A flag (in varying shades of red depending on your choice) appears in the Flag column of the inbox and the message is copied to your To-Do Bar.

## Flag a message you send to remind you to later check the message for replies

1. Open a new email message and select **Follow up** from the **Options** group.
2. Indicate when you want to be reminded about the message or select **Custom** to create a start date and due date.

## Assign a category to a flagged item

1. Right-click a flagged item and select **Categorize**.
2. Click the category that you want to assign to the item.

## Clear a flag

1. Right-click on the message from your Inbox, To-Do Bar, or Sent Items.
2. Select **Follow up > Clear Flag**

## FIND ALL RELATED MESSAGES OR MESSAGES FROM THE SAME SENDER

### Find All Related Messages (same subject)

*From the inbox –*

- Right-click message in the inbox and select **Find All... > Related Messages...** The Advanced Find window appears with all related messages.

*From the message –*

- From the ribbon, in the Find group, select **Related > Related Messages...** The Advanced Find window appears with all related messages.

### Find All Messages from Sender

*From the inbox –*

- Right-click message in the inbox and select **Find All... > Messages from Sender...** The Advanced Find window appears with all messages from the specified sender.

*From the message –*

- From the ribbon, in the Find group, select **Related > Messages from Sender...** The Advanced Find window appears with all related messages.

## USE RULES TO MOVE SPECIFIC MESSAGES TO ANOTHER FOLDER

1. Right-click the message that you want to base the rule on and click **Create Rule**.
2. In the **Create Rule** dialog box, select the check boxes for the options that are already filled in with information from your selected message.
3. Select the **Move e-mail to folder** check box.
4. Click an existing folder or click **New** to create a new folder to store the messages.
5. To add more conditions, actions or exceptions to the rule, click **Advanced Options**, and then follow the Rules Wizard instructions.
6. To run this rule as soon as you create it, select the **Run this rule now on the messages already in <folder>** check box on the last page of the Rules Wizard.

All the messages already in your inbox are moved to the other folder. To test your new rule, take a look at your new folder. Were the correct messages moved?

## FAVORITE FOLDERS

The Favorites list, located at the top of the Navigation Pane, contains shortcuts to folders such as your Inbox, Sent Items and Search Folders. You can add, remove, and arrange folders in this section to access your favorite mail folders more easily. There are two ways to add or remove mail folders in Favorites.

1. Right-click the folder you want to add or remove to Favorites, and then click **Add to Favorites Folder** or **Remove from Favorites Folder**. OR
2. Click a folder and drag it to or from **Favorites**.

*NOTE: Make sure you remove folders from Favorites rather than delete them. When you remove a folder from Favorites, the original folder in the folder list remains. Deleting a folder from Favorites deletes the folder and its contents from Outlook.*

### Arrange the Order of Folders in Favorites

Folders in the folder list are arranged alphabetically. However, in Favorites, you can arrange the folders in any order. By default, when a folder is added to Favorites, it appears at the bottom of the list.

- To rearrange the folders, click and drag the folder to the new position in the Favorites list.

## SEARCH FOLDERS

A search folder is a virtual folder that provides a view of all email items that match specific search criteria. For example, the **Unread mail** search folder allows you to view all unread messages from one location even though the messages may be located in different mail folders.

### Default search folders

There are three default search folders in the Navigation Pane that you can already use.

- **Categorized mail** – includes items that have been assigned a color category.
- **Large mail** – includes items that are larger than 100 KB.
- **Unread mail** – includes items that are marked as unread.

### Use predefined search folders

In addition to the default search folders, Outlook includes a list of predefined search folders. You can customize a predefined search folder with your own search criteria.

1. From Mail, select **File > New > Search Folder**.
2. Select a predefined search folder.
3. If prompted, under **Customize Search Folder**, specify the search criteria to use.
4. Click **OK** when done.

### Create a custom search folder

1. From Mail, select **File > New > Search Folder...**
2. Click **Create a custom Search Folder**.
3. Under **Customize Search Folder**, click **Choose**.
4. Type a name for your custom search folder.
5. Click **Criteria**, select the options you want, and then click **OK**.
6. Click **Browse**, select the folders to be included in the search, and then click **OK** three times.