

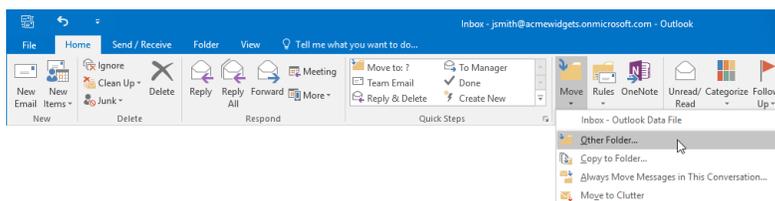
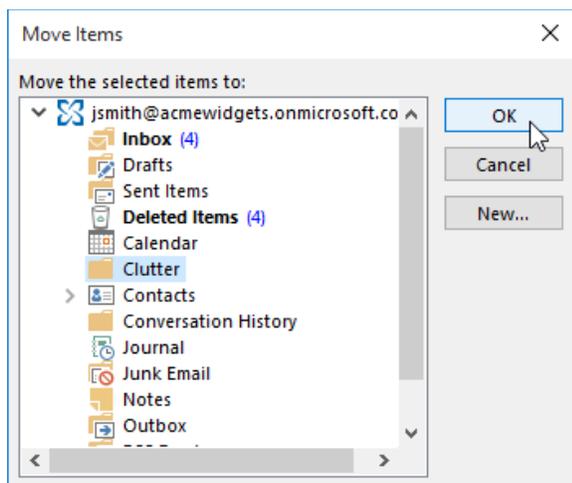


## Organizing Messages into Folders

With the hundreds of messages that come into your inbox, you can feel overwhelmed when trying to locate a particular message or group of messages. To avoid an unorganized inbox, simply create and organize your messages into folders.

To create a folder:

1. On the Folder tab, in the New group, click the New Folder button. This opens the Create New Folder dialog box.
2. In the Name box, type the name that you want.
3. In the Folder Contains, select Mail and Post Items. Then in the Select where to place the folder box, click Inbox. Then click Ok.
4. To add messages to your new folder, simply click on the message that you want to move and drag it to the name of the folder that you want it placed in. You can also move the message by clicking the Move button in the Move group and selecting the folder name. Another way to move a message to a folder is to right click on the message and then click the Move option and again select your folder.



## Quickly Locating Messages

You can conduct a search within Outlook to quickly locate any of your e-mail messages. You can search using a specific term that may either be located in the subject, message, sender's name, recipients' names, or attachment.

As you enter a search term in the Search box located at the top of the content pane in any module, Outlook filters the items to show only those items in the module that contain the search term and highlights the search term in the list of results. If your search comes back with numerous results, only the first 200 will be displayed.

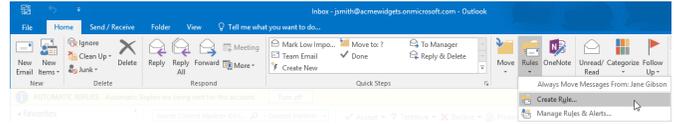
When you activate the Search box, a Search contextual tab will appear in the ribbon. By default, the Search will be set to the Current Folder. By clicking the All Mail Items button in the Scope group, your search will look through all folders that you have created. You can also narrow down your search by selecting buttons on the Refine group. The Refine group allows your search to be narrowed down by From, Subject, Has Attachments, Date, Sent To, and More.



## Creating Rules

**Rules** can be configured to move e-mail to a specified location, play a specific sound, or display a New Item Alert window based on the sender, subject, and/or whom it was sent to.

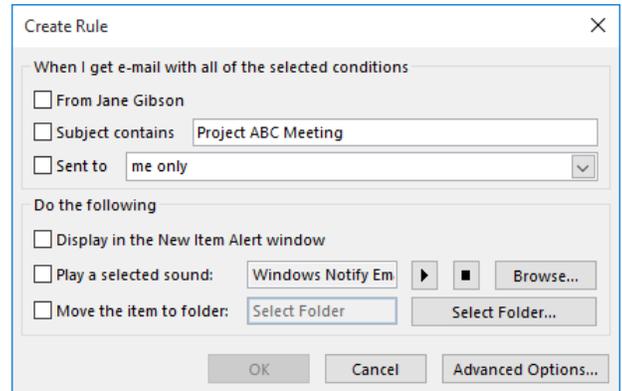
To create a rule, first select a message that you would like to base the rule on. Next, open the Create Rule dialog by clicking Home → Rules → Create Rule.



(You can also right-click an e-mail that you would like to base the rule upon & click Rules → Create Rule.)

Either way will display the Create Rule dialog box

The first part of the box (“When I get e-mail with all of the selected conditions”) specifies which conditions are required in order for the rule to run.



Here is an overview of these options:

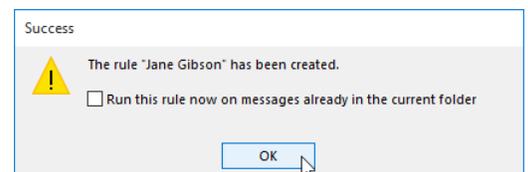
- The **From** checkbox will already include the name of the person who sent the e-mail that you are using to create the rule. When checked, this control will ensure that every e-mail message sent to you by the specified person will be included by the rule.
- The **“Subject contains”** field will automatically be filled in with the subject of the e-mail that you are working with. This text box can be edited to anything that you want. Checking the corresponding checkbox will ensure that every e-mail message received by you with the specified subject line will be included by the rule.
- Finally, the **“Sent to”** drop-down menu is used to base the rule that you are creating on whom a message was sent to. This can include a distribution list or any other recipients of the message.

The “Do the following” section in the Create Rule dialog box includes controls that are used to set what actions will happen when the conditions set in the “When I get e-mail with all of the selected conditions” section are met.

Here is an overview of these options:

- When the **“Display in the New Item Alert window”** checkbox is checked, a special window will be displayed when an e-mail arrives that meets the conditions.
- Checking the **“Play a selected sound”** checkbox will have a specified sound play when a message arrives that meets the conditions outlined at the top of the Create Rule dialog box. Using the Browse button, you can choose a new and unique sound.
- Finally, checking the **“Move the item to folder”** checkbox will move e-mails that meet conditions you previously configured to a specified folder. Checking this checkbox will display a dialog box that can be used to specify the folder.

Once you have configured the conditions and actions for the rule that you are creating, click the OK button to complete the process. A dialog box will be displayed to notify you that the rule has been created. It will also provide you with an option to run this rule on messages that already exist in the current folder.



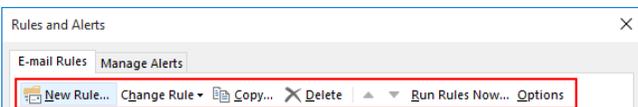
## Managing Rules

To manage existing rules, you will need to open the Rules and Alerts dialog using one of these command sequences:

- Click Home → Rules → Manage Rules & Alerts
- Right-click an e-mail and click Rules → Manage Rules & Alerts

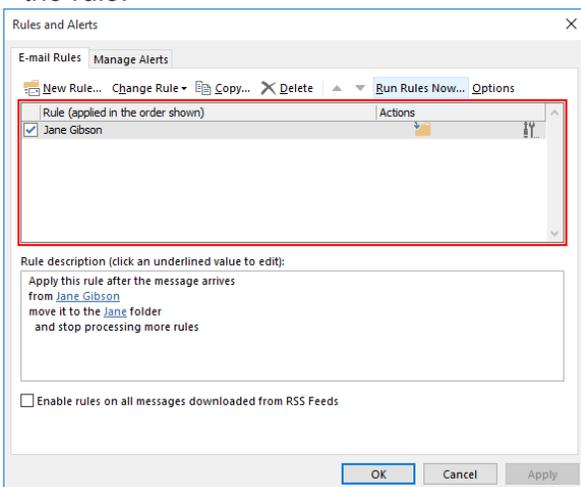
With either of these command sequences, you will then see the Rules and Alerts dialog box open to the E-mail Rules tab.

The toolbar at the top of the dialog gives you options to create a new rule; to change, delete, copy, or move the selected rule; or to run the rule now



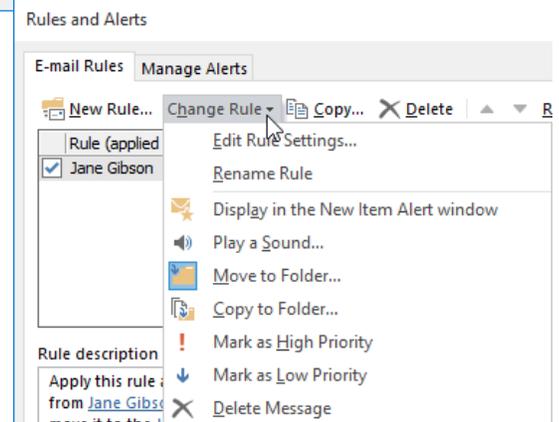
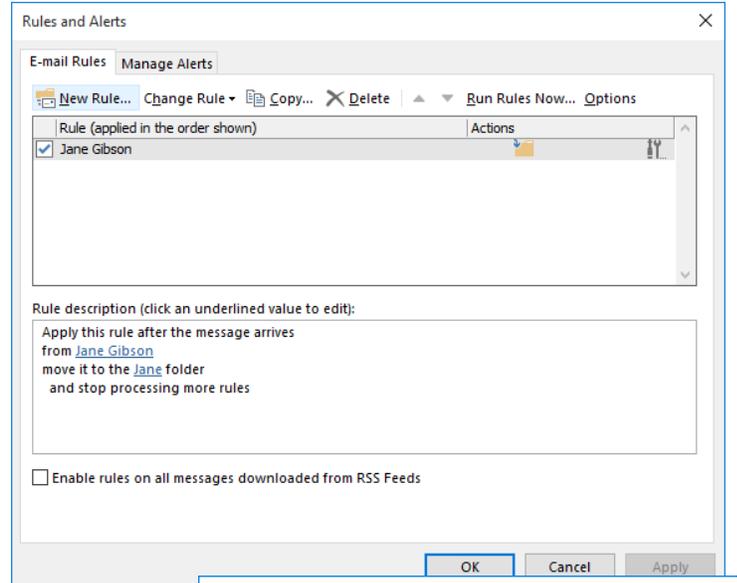
If you're just looking to make a quick change to a rule's action, the Change Rule button is the best way to do it. Clicking this button will display a menu of self-explanatory options.

This drop-down menu gives you the option to rename the rule, as well as add or remove different options. The options that are already in use for the rule are highlighted with blue shading (for example, "Move to Folder" in the sample menu above). Clicking on an option that is shaded in will remove that action from the rule, while clicking an unshaded option will add that action to the rule.



Lower in this dialog box is a section that will provide you with details about the selected rule. For example, here you can see that the selected rule is applied to messages sent by Jane Gibson and it will move them to the Jane folder.

In this section, you can click the parts that are underlined in blue to change that action or value.



Below the toolbar in the Rules and Alerts dialog box, you will see a list of any existing rules and icons that represent their actions.

There's also a checkbox by the name of each rule. If the box is checked, the rule is on; if the box is unchecked, the rule is off. You can click the checkbox to change this on/off status.

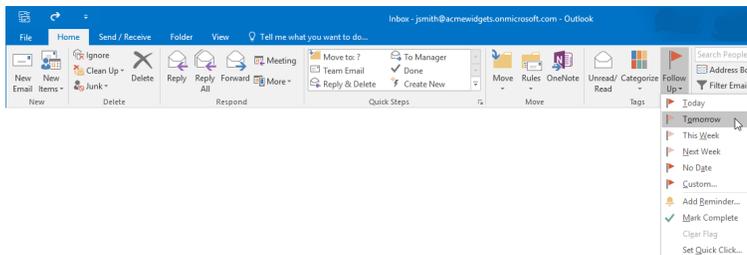
Lower in this dialog box is a section that will provide you with details about the selected rule. For example, here you can see that the selected rule is applied to messages



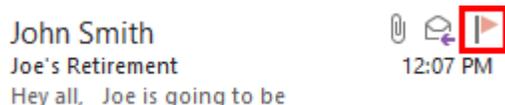
### Flagging Messages for Follow-Up

Outlook also features a handy tool that adds follow-up flags to your messages. This feature allows you to quickly see which messages require follow-up. It will also remind you to follow up by the specified deadline (today, tomorrow, this week, next week, etc.).

To mark a message for follow-up, select it and then click Home → Follow Up → [Follow-Up Flag]



Once you add a follow-up flag, it will be visible in that message. A reminder (if applicable) will also be shown and displayed within the To-Do Bar. You can mark an item as complete by clicking the flag icon



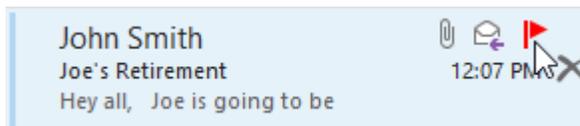
#### Follow-Up Flag Options

There are several different follow up options that you can choose from:

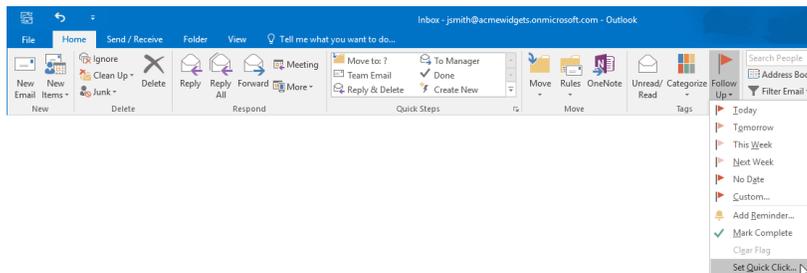
- **First Five Options:** Set the date for the follow-up.
- **Custom:** Opens a dialog to set the type of flag, start time, due date, and reminder. Also has an option to clear an existing flag.
- **Add Reminder:** Add a reminder to this flag.
- **Mark Complete:** Change the flag to a checkmark to indicate that the follow up is complete.
- **Clear Flag:** Clear the existing flag; useful if you have flagged a message by accident.
- **Set Quick Click:** Control what happens when you click the flag icon in a folder.

#### Set Quick Click for Flags

If you find yourself using the same flag type over and over again, you can assign it as a Quick Click for flags. Doing this allows you to apply this flag by clicking the flag icon that appears inside the listing for an Outlook item



To assign the Quick Click flag type, click Home → Follow-Up → Set Quick Click



This action will display the Set Quick Click dialog box. Using the drop-down menu, you can then choose the flag that you would like to assign as the Quick Click flag. Click OK to apply any new settings.

