GSD. MS Outlook - Ways to Organize Emails in Outlook

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General Information:

Possible symptoms/errors:

User wants to know how to organize their emails in Microsoft Outlook.

Alternative names of the system:

N/A

IMPORTANT NOTICE:

N/A

Solution:

This article describes the following Outlook functionalities for organizing emails.

How to organize emails by using folders:

Users can create folders to organize emails, move messages, and add folders to their Favorites folder for easy access.

How to create a folder:

Advise user to Right-click Inbox and select New Folder.User must type a name for the folder and press Enter.

How to move messages into a folder:

Advise user to select an email message.User must drag and drop it into a folder.

NOTE: To move more than one email, select an email, advise user to hold down the Shift key and to select other messages, and then to click, drag, and drop them into a folder.

How to add a folder to Favorites:

To add a folder to Favorites, advise user to right-click the folder, and then to select Show in Favorites.

NOTE: User can also select the folder, and then drag and drop it in Favorites.

How to Manage Folders in Outlook application:

To help user with organizing their emails, they can create sub-folders or personal folders by using the New Folder tool in Outlook. Advise user to follow the instructions below.

A. Create a New Folder

In the Outlook window, advise user to click on Folder menu then to select New Folder.

In the Create New Folder window, user must enter the folder name.

Inform them to select the folder where they would like to add the new folder then to click OK.

B. Organize Folders

Other available options in the Folder menu tab are:

Copy folder- copy the selected folder to a new location.

In the navigation pane, user must select the folder they want to copy.

In the Folder tab, inform them to click Move Folder.

In the next window, user must select the destination folder where they want to copy the selected folder the click OK.

Move Folders - move the selected folder to a new location.

In the navigation pane, user must select the folder they want to move.

In the Folder tab, advise them to click Move Folder.

In the next window, user must select the destination folder where they want to move the selected folder the click OK.

Delete Folder - delete the selected folder.

In the navigation pane, user must select the folder they want to delete.

In the Folder tab, advise user to click Delete Folder.

A pop-up window will appear asking if user wants to delete the folder and send the contents to the Delete Items Folder, they must click Yes.

C. Create a New Search Folder

User can also search emails from the folders created by using the New Search Folder.

How to Create Outlook Email Rules to Easily Organize Emails:

Rules allow user to move emails to different folder based on the sender, recipients or conversation topic of the email. For example, they can create rule automatically to move all email sent to a group they are a member of, to a specific folder or delete all messages with "Buy now" in the subject.

A. How to create a rule on a message:

Advise user to:

Right-click an existing message and select Rules > Create Rule.Select a condition, and what to do with the message based on the condition.

For example, to move messages with a certain title to a specific folder, select the Subject contains condition, select Move the item to folder, select or create a New folder, and then select OK.

When they're done creating the rule, select OK.To use the rule right away, select the Run this new rule now on messages already in the current folder checkbox, and then select OK.

The message now appears in that folder.

B. How to create a rule from a template:

Advise user to:

Select File > Manage Rules & Alerts > New Rule.Select a template.

For example, to flag a message:

Select Flag messages from someone for follow-up.

Edit the rule description.

Select an underlined value, choose the options they want, and then select OK.

Select Next.Select the conditions, add the relevant information, and then select OK.Select Next.Finish the rule setup.

Name the rule, setup rule options, and review the rule description. Click an underlined value to edit.

Select Finish.

Certain rules will only run when Outlook is on. If user gets this warning, they must select OK.

Select OK.

How to set categories, flags, reminders, or colors to an email in Outlook:

In Outlook, user can add a flag, set a reminder for a flagged email, and assign a color category to an email message to organize your inbox.

Set a Follow Up flag:

Select the email message.Select the .The flag turns red and a Follow up message appears in the header of the email message.

Note: Follow Up flags are used for actionable items only.

View all Follow Up Flags:

Select View >To-Do Bar >Tasks.

The To-Do Bar pane opens and shows all flags.

Remove a Follow Up Flag:

Right-click the email message.Select Follow Up > Mark Complete.The Follow Up Flag changes to a green checkmark and is removed from the To-Do Bar.

Set a Reminder:

Select the email message for which you want to set the reminder.Select Home >Follow Up > Add Reminder.In the Custom box, for Flag to, select Follow up or type a description.Check the Reminder box, enter date and time, and then select OK.An alarm bell icon will appear on the message.To change the time for the reminder, select Follow Up, select Add Reminder, edit the time, and then select OK.

Find an Action Item:

If Outlook finds something in an email that looks like an action item, an Action items tab automatically appears on the reading pane.Select the Action Items drop-down arrow to read the action item, and then select FOLLOW UP if you'd like to set a Follow Up Flag to remind you to do that action item.

Note: If you select FOLLOW UP, the action item displays in the To-Do Bar pane.

When the task is done, mark it complete.

From the Action Items drop-down, select Mark Complete, orIn the To-Do Bar pane, right-click the flagged message and select Mark Complete.

Create color categories:

Select Home > Categorize > All Categories.To Rename a category color, in the Color Category box, select a color category, and then select Rename. Type an appropriate name for the selected category, and then press Enter.To change the category Color, select the color you want from the Color drop-down .To create a New color category, select New, type a name, select a color, and select OK.When you are done with Color Categories, select OK.

Assign an email a color category:

Right-click an email message.Select Categorize, and then select an appropriate color category for the message.