

Categorize Sent Items

Outlook offers the option to categorize your Sent Items via the Messages Options dialog when composing a new item or when you go into the Sent Items folder after you have sent your messages. Sadly, it doesn't offer this option directly on the Ribbon for easy access nor is there an option to add it to the Ribbon or Quick Access Toolbar (QAT) yourself.

For real “categorizers” and people who like to create rules based on categories, this omission makes categorizing sent items a cumbersome process.

This guide contains a small simple macro offering easy access to the Categorize function when composing a message and a variant of that which will help you to remember to set a category when sending a message.

- **Show Categories Dialog macro**
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Show Categories Dialog macro

The Show Categories Dialog macro is a really short macro which launches the built-in Color Categories dialog of Outlook for the current message. By creating a button for this macro you have 1-click access to the categorize feature when composing a message.

Quick Install

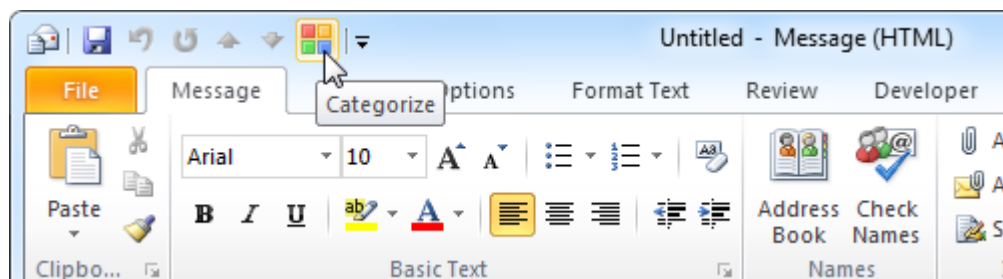
1. Download **this code-file** (catdialog.zip) or **copy the code** below.
2. Open the VBA Editor (keyboard shortcut ALT+F11)
3. Extract the zip-file and import the `ShowCatDialog.bas` file via File-> Import...
If you copied the code, paste it into a new module.
4. **Add a button** for easy access to the macro.
5. **Sign your code.**

Macro code

The following code is contained in the zip-file referenced in the Quick Install. You can use the code below for review or manual installation.

```
Public Sub ShowCatDialog()
    Dim olMessage As Outlook.MailItem
    Set olMessage = Application.ActiveInspector.CurrentItem
    olMessage.ShowCategoriesDialog
End Sub
```

Click in the area above and press CTR+A to select all. Press CTRL+C to copy the code.



The original Categorize icon is available as a custom icon when you add a button for the macro on the QAT or Ribbon to make it look and feel like a native option.

Categorize when sending macro

If you want to be reminded to set a category when sending a message, this variant of the above macro might work better for you. For each message that you have forgotten to set a category it will automatically prompt you to do so with the Categorize dialog. You can cancel this dialog in case you want to send it without a category.

Quick Install

1. Download **this code-file** (catdialog.zip) and copy the code from the CatSentItems.txt file or **copy the code** below.
2. Open the VBA Editor (keyboard shortcut ALT+F11)
3. Paste the copied code in the ThisOutlookSession module.
4. **Sign your code.**

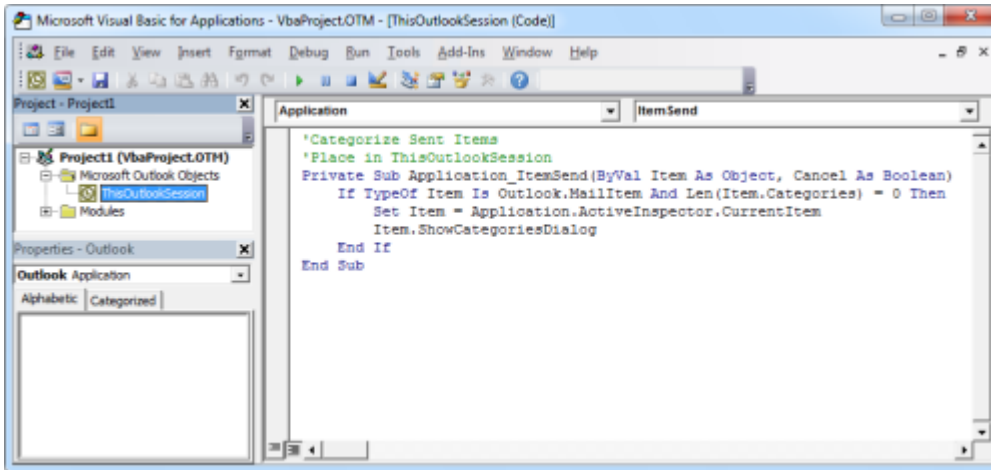
Macro code

The following code is contained in the zip-file referenced in the Quick Install. You can use the code below for review or manual installation.

```
'Categorize Sent Items
'Place in ThisOutlookSession
Private Sub Application_ItemSend(ByVal Item As Object, Cancel As Boolean)
    If TypeOf Item Is Outlook.MailItem And Len(Item.Categories) = 0 Then
        Set Item = Application.ActiveInspector.CurrentItem
        Item.ShowCategoriesDialog
    End If
End Sub
```

End Sub

Click in the area above and press CTR+A to select all. Press CTRL+C to copy the code.



The above code copied in ThisOutlookSession of the VB Editor (click on image to enlarge).

Strip or leave categories for recipient

By default categories are private use only. This means that they will stay on your sent item in the Sent Items folder but the recipient of the message will receive the message without categories.

To send out your messages with your assigned categories you must set the following Registry key;

Key: HKEY_CURRENT_USER\Software\Microsoft\Office\<version>\Outlook\Preferences

Value name: SendPersonalCategories

Value type: REG_DWORD

Value: 1

Note:

Categories can still get stripped at Exchange server level or by the recipient via a rule. Verify that everybody is set up correctly when you want to use this. In that case my recommendation would be that you ask your Exchange administrator to configure Exchange to leave the categories for internal communication but strip them when it leaves the organization as they could expose internal processes and information.

Categorization add-ins

If you are very serious about categorization, the following add-ins offer some additional functionality and

flexibility you might want to have;

- **CatMan** by CodeTwo *(free)*

Allows for central management for creating and sharing categories with other users via a local network or even the Internet. Users are still free to add and create their own categories as well.

- **Category Manager** by VBOffice

With Category Manager you get all of your categories in a side-bar for quick access. In addition it adds a reminder service to set a category to keep your filing system consistent, create an overview how often categories are used, allows you to import, export and synchronize your categories with a central category list and much more.

- **Categorize Plus** by Veranosoft *(free version available)*

Categorize Plus is an add-in for Microsoft Outlook 2007 and 2003 that enables users to categorize, filter and search Outlook items so that information can be found quickly with the fewest possible keystrokes. In addition, custom menus can be build to allow for subcategories support and actions can be assigned to categories to perform tasks automatically based on the selected category.

Last modified: April 6, 2011