Organizing and Managing Email

Outlook provides several tools for managing email, including folders, rules, and categories. You can use these tools to help organize your email.

Using folders

Folders can help keep messages organized. There are four default folders in Mail view: Inbox, Drafts, Sent Items, and Deleted Items. Just like the folders on your computer, folders in Outlook can be nested to create multiple layers of organization. For example, you might create several folders within the Inbox folder to keep track of the different types of messages you receive.

- To access folder commands, locate and select the Folder tab on the Ribbon. The Folder tab will appear.

Click the buttons in the interactive below to learn more about using the Folder tab.
To create a new folder:

Before creating a new folder, select the desired location for that folder. In our example, we'll create a folder within the Inbox folder to help organize messages containing important memos.

1. Locate and select the Folder tab on the Ribbon. The Folder tab will appear.
2. Select the desired location for the folder, then click the New Folder command.
3. The **Create New Folder dialog box** will appear. Type the **name** for the folder, then click **OK**.

4. The folder will be created in the selected location.

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### Using categories

**Categories** can make it easier to find and organize messages. Applying a category is much like moving a message to a folder, but with one important difference: you can apply **multiple categories** to any message. For example, if you received a message about an **upcoming safety meeting**, you could apply both the **Safety** and **Meetings categories**. Categories are designed to be customizable—it's easy to **rename categories**, choose new category **colors**, and **create new categories**.

### To customize categories:

Outlook offers **six default categories**, which are named according to their colors. Customizing category names before you start using them makes organizing easier.
1. Locate and select the **Categorize** command on the **Ribbon**, then select **All Categories...** from the drop-down menu.

![Categorize ribbon in Outlook](image1.png)

2. The **Color Categories** dialog box will appear.

3. Select the desired category, then click the **Rename button**. In this example, we'll rename one of the default categories to help organize messages about upcoming **staff meetings**.

![Color Categories dialog box](image2.png)

4. Type the **new name** for the category. Select a **new color** if desired. Once you're satisfied with the changes, click **OK**.

![Select the category you want to customize](image3.png)
5. The **customized category** will appear in the categories list.

To apply a category:

1. Select the **desired message**, then click the **Categorize** command on the **Ribbon**.
2. Select the **desired category** from the drop-down menu.
3. The category will be **applied** to the message and visible in both the **View** and **Reading** panes.

To filter messages by categories:

Once categories have been applied to some messages, you can easily view all of the messages in any given category by using a **filter**. For example, you may wish to view messages in the **Meetings** category so you can see everything that pertains to an upcoming meeting.

1. Locate and select the **Filter E-mail** command on the **Ribbon**, hover over **Categorized**, then select the **desired category** from the drop-down menu.
2. Messages matching the **selected category** will appear in the **View pane**.
Applying rules

Rules can save a lot of time by automatically performing commands like moving or deleting messages as they arrive. For example, if you always move emails from a certain person to a folder, you could create a rule to do this automatically. You can create rules that look for a specific sender, recipient, subject, or specific words that are contained in the body of the email.

To create a new rule:

Locate and select the Rules command on the Ribbon, then select Manage Rules & Alerts... from the drop-down menu.

1. The Rules and Alerts dialog box will appear.
2. Click the New Rule... button.
3. The **Rules Wizard** will appear. Follow the instructions to **create** a new rule.

4. Under **Step 1: Select a template**, select the template that you want from the **Stay Organized** or **Stay Up to Date** collection of templates.

5. Under **Step 2: Edit the rule description**, click an underlined value. For example, if you click the people or public group link, the Address Book opens.

6. Click **Next**.

7. Under **Step 1: Select condition(s)**, select the conditions that you want the messages to meet for the rule to apply.

8. Under **Step 2: Edit the rule description**, click an underlined value for any condition that you added, and then specify the value.

9. Click **Next**.

10. Under **Step 1: Select action(s)**, select the action that you want the rule to take when the specified conditions are met.
11. Under **Step 2: Edit the rule description**, click an underlined value for any action that you added, and then specify the value.

12. Click **Next**.

13. Under **Step 1: Select exception(s)**, select any exceptions to the rule, and then click **Next**.

14. Under **Step 2: Edit the rule description**, click an underlined value for any exception that you added, and then specify the value.

15. Click **Next**.

16. Under **Step 1: Specify a name for this rule**, enter a name.

17. Under **Step 2: Setup rule options**, select the check boxes for the options that you want.
   - If you want to run this rule on messages that already are in the **Inbox**, select the **Run this rule now on messages already in “Inbox”** check box.
   - By default, the new rule is turned on. **To turn off the rule**, clear the **Turn on this rule** check box.
   - To apply this rule to all email accounts set up in Outlook, select the **Create this rule on all accounts** check box.

18. Click **Finish**.