

The **Software Pro**

Outlook 2007

***Tips, Tricks &
Techniques***



***101 Ways to
Make the
Most of
Microsoft
Outlook***

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Techniques for Handling Incoming E-mail

Microsoft research indicates the average Outlook user reads 1800 e-mails & deletes an average of 1500 e-mails per month. Other sources cite that many corporate e-mail users handle more than 200 messages a day. How many messages do you manage every day? How do you focus on your urgent e-mail and organize the rest for your review? Think about how you handle your paper mail. You probably sort your paper mail quickly before you read it to figure out what to look at first, what to read later, and what to throw away.

Here are some of the ways to automatically process and prioritize your electronic mail for better and faster results, including some tips covered in earlier sections:

- Folders ([see Page 62](#))
- Categories ([see Page 55](#))
- Views ([see Page 44](#))
- Color coding ([see Page 67](#))
- Rules ([see Page 68](#))

These techniques may help you stop compulsively checking e-mail or what I call **E-MAIL OCD** because you will make Outlook your own personal assistant.

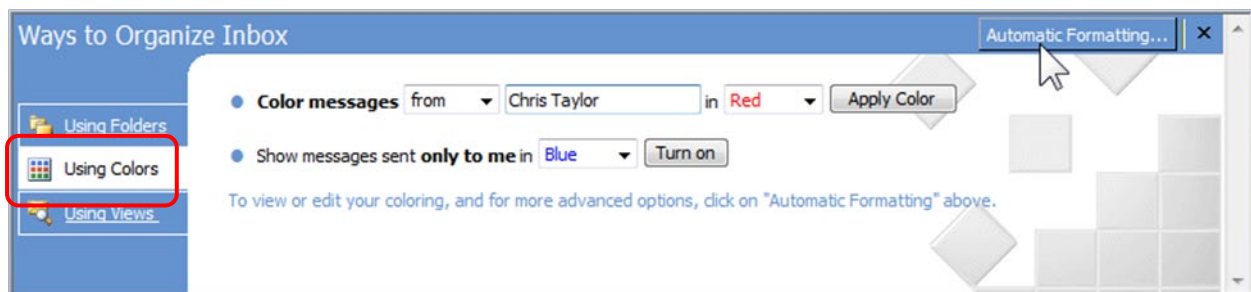
We'll also highlight other tips for working with incoming messages including the Out of Office Assistant, filtering junk mail, reducing your Outlook mailbox size, and handling attachments.

Color Coding to Identify E-mail from Specific Senders

Color code important messages to quickly identify e-mail from your most important contacts such as staff, your boss, or team members. This approach is a huge timesaver and helps to insure you don't miss key messages.

To color code in Outlook:

1. Highlight a message from a contact. If you don't have one, you can enter the sender's name manually when you color messages. The next steps assume you are in the Mail view.
2. Pick **Tools > Organize**. This opens a new window at the top of your Inbox window.
3. Choose the option **Using Colors** (found at the left of the window).



Using colors to organize messages

4. In the first condition statement, choose **from** in the first drop-down list. Your other option is **sent to**.
5. If you selected a message before starting, the sender's name appears in the text box to the right. You can also type a name or e-mail address.
6. Choose a color from the second drop-down list and **Apply Color**.
7. Additionally, you can also pick **Show messages sent only to me** as a way to highlight messages which are not part of a group distribution.
8. Optionally, choose **Automatic Formatting** (upper-right corner of window) to view coloring choices or even to apply a different font. Pick this option as well to delete or modify a color rule.
9. Close the **Organize** pane when you are done.

Now Outlook will display all messages, existing and new, from the person you specified in the color you selected. In the example below, e-mail from **The Big Boss** are highlighted in **Red**.

✉	Dawn Bjork Buzbee-The Soft...	Map and Directions to Dallas office for site visit	Wed 4/14/2...	10 KB
✉	The Big Boss	Meeting with Affiliated Manufacturing	Wed 4/14/2...	9 KB
✉	Dawn Bjork Buzbee-The Soft...	Materials for Outlook training in Chicago	Tue 4/13/20...	122 KB
✉	The Software Pro-Customer C...	Training example for your review	Tue 4/13/20...	25 KB
✉	The Big Boss	Revised Operating Plan and Financial Stateme...	Tue 4/13/20...	24 KB
✉	The Big Boss	Meeting with Affiliated Manufacturing	Tue 4/13/20...	9 KB

Organize Messages Using Rules

Do you ever get tired of your Inbox filling up with daily reports sent by the same person? Do you regularly receive professional newsletters which take up room in your Inbox but you would still like to read them later? Are you spending too much effort trying to locate key communication?

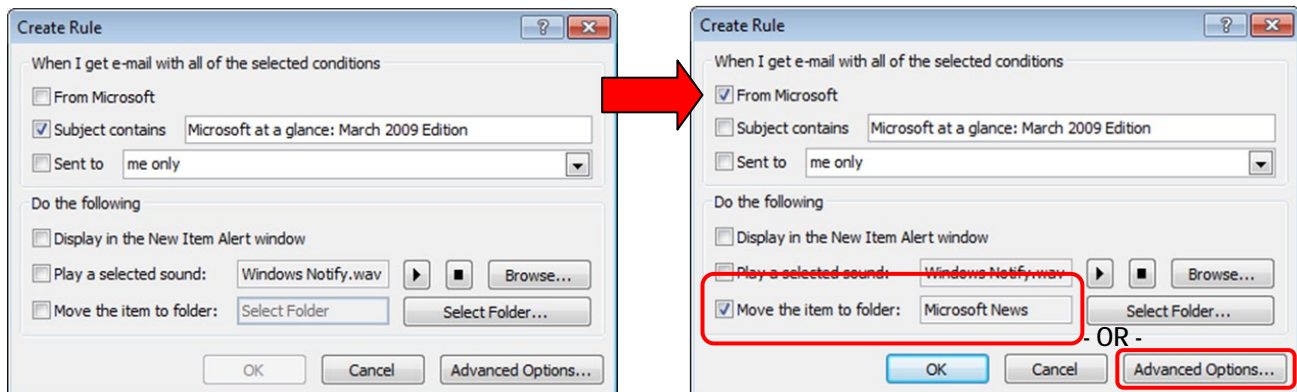
Who has the time to read all these messages when they arrive? Wouldn't you rather have them moved automatically or labeled with a category? By using rules, you choose which messages go where.

To create a rule for an incoming e-mail message:

1. Select a message (you do not have to open it). This is the quickest way to create a rule.
2. Right-click on the message and left-click on the choice, **Create a Rule**.

When an existing message is selected, you can build a rule from the properties of the message.

For example, perhaps I want all messages from Microsoft to be moved to a folder called *Microsoft News*. In the example to the left, the subject is too specific, but checking the From Microsoft option might be broad enough to process current and future messages from Microsoft.



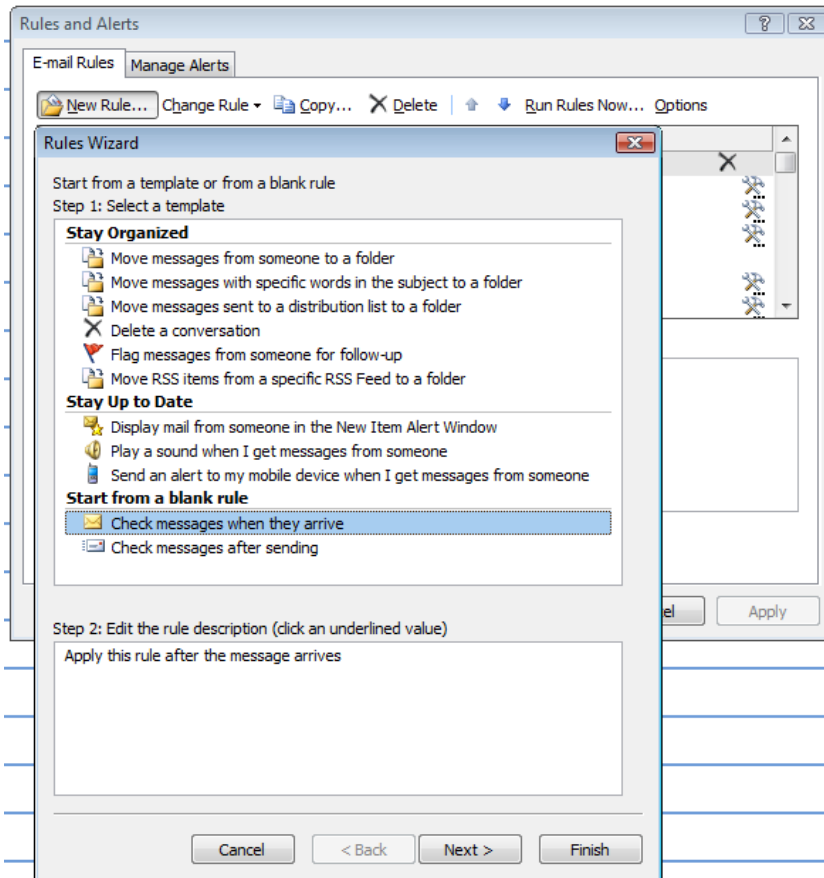
Create a rule from an existing message

3. Once you have set your preferences, click **OK** to create the new rule.
4. If the options in the Create Rule dialog box are not specific enough, pick **Advanced Options** for more detailed criteria for your rule.
5. Follow the steps of the **Rules Wizard** dialog boxes (example shown on [Pages 69-70](#)) to set the conditions for processing your incoming mail.

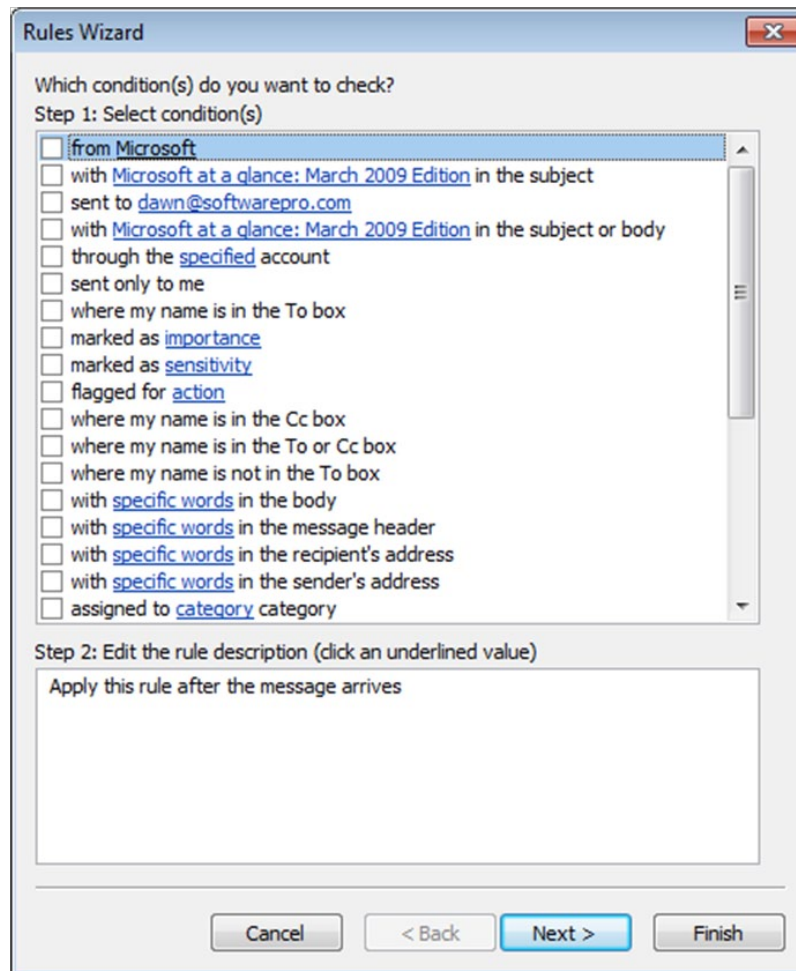
Rules will not only be applied to new incoming messages, but they can also be applied to existing messages in your Inbox.

To create rules without a specific message selected:

1. With Outlook Mail open, click **Tools**.
2. Pick **Rules and Alerts** which opens the Rules and Alerts dialog box.
3. Click **New Rule** which opens the **Rules Wizard**. Choose from an existing template or build your choices from a blank rule.

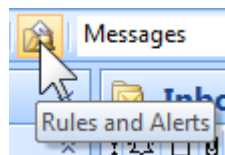


4. Click **Next** to pick the conditions for the rule such as **From People or Distribution List**. See example wizard screen on [Page 70](#).
5. Pick **Next** to select the actions for the rule such as moving the message to a specific folder or assigning to a category.
6. Select **Next** to identify any exceptions and then move to the final screen where you name the rule and indicate if you want to run the rule on messages in the Inbox and/or turn on the rule.
7. **Finish** to complete creating the rule.



Organizing messages with rules: selecting conditions in the Rules Wizard

With Outlook 2007, you can also create rules to file e-mail messages by selecting the message and then clicking the **Rules and Alerts** button on the Advanced toolbar.



Learn Easy Navigation

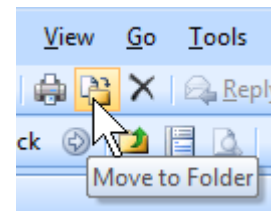
Stop wasting time by moving in and out of each message and start applying simple navigation tricks. In Outlook you can move in your Inbox with the up or down arrow key to select a message. Then press **Enter** to open the message. To move to the next message directly from the current e-mail, look for Quick Access Toolbar buttons with arrows or press **Ctrl** + **>** for the next message and **Ctrl** + **<** for the previous e-mail. Press **Esc** to close the active message.

Just File It

Sometimes you receive a message you do not need to act upon, but you may need at a future date. File these messages in a main reference folder labeled **1-Reference** (or something similar).

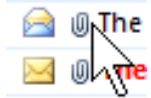
To file a message (choose a technique):

- Drag it to the appropriate reference folder,
-OR-
- Click the **Move to Folder** command on the toolbar,
-OR-
- Right-click the message and pick **Move to Folder**,
-OR-
- Press **Ctrl** + **Shift** + **V** to bring up the **Move to Folder** dialog box.



Working with Attachments

If you receive a message with a file attached to it, you can use Outlook to quickly preview the contents of the attached file in the reading pane. Attachments are identified by a special paperclip icon. Alternately, if you know you want to work with the attachment immediately, you can open it directly from your message.



Open an Attachment

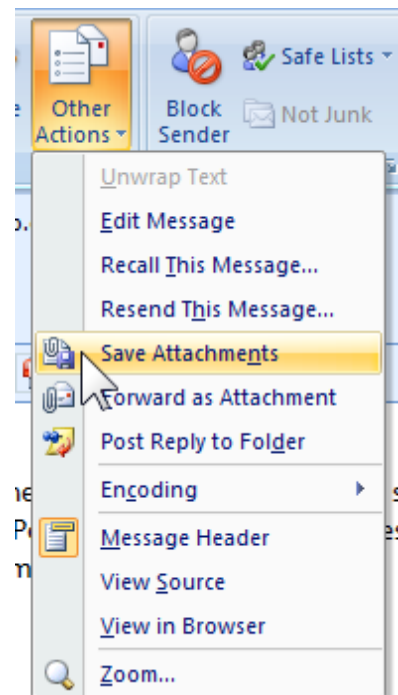
To open an attachment:

1. Open the message or preview it in the reading pane.
2. Double-click on the attachment to open the file or right-click the attachment and pick **Open**.
3. The file opens in the appropriate program, such as Microsoft Excel, if available on your computer.

Save Attachments

To save an attachment:

1. Open the message.
2. Select **Other Actions** from the **Task** tab. Then pick **Save Attachments**.
3. The **Save Attachment** dialog box appears; locate and select the folder where you want to save the file and click **Save**.
4. Respond to the message as needed and close.
 - OR-
 - 1. Open the message or preview it in the reading pane.
 - 2. Right-click the attachment, and choose **Save As**.
 - 3. Pick the location where you want to save the attachment.



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