



8 Simple Tips for E-Mail Management in Microsoft Outlook

The Definitive Guide for Lawyers, Accountants, Engineers, Architects, Programmers, Web Developers, Bankers, Entrepreneurs, Sales Executives in fact anyone who works on a Client, Project or Case basis.

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Introduction

Hi ... Sanjay Singh here. I recently surveyed close to 10,000 readers and customers to find out if they needed help with filing and retrieving emails. This is what I found out...

**Many users still do NOT have a system for filing their emails.
Even users, who KNEW they needed a system, were not using one ...
They either don't have the time or enough information to get started.**

The top 3 reasons reported by users for not implementing an email management system are:

Reason #1: Outlook's built-in automatic filing tools (Rules and Auto-Archive) don't seem to move things logically for me!

I agree 100%! That's why my tips #1 and #2 advise you to turn these features OFF. We're going to show you an easier way... that still does not need anything outside Outlook.

Reason #2: I don't have the time.

I think a reader said it best...

When should I file? If I am busy with work then e-mails just build up, if I am busy with e-mails, my work does not get done. (John)

In this report we're going to give you a system that takes very little extra time but still gets all your filing done. In the next report, we'll show you some additional tips to bring the time down to (almost) zero.

Reason #3: How should I structure my email management system... there seems to be so many different ways of doing this.

I like to keep things as simple as possible so I normally recommend to my clients... Create a folder structure inside Outlook that matches the way you file your paper documents. It makes it much easier to find emails (or for that matter anything) later if they're all filed using the same system.

**You can create and use a simple email management system TODAY... with nothing more than Outlook.
This system is already being used by thousands of our customers around the world.
Let's get started...**

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In the following pages I have provided step-by-step instructions for a VERY SIMPLE email management that **will work for any businessperson who works with clients, projects or cases.**

Use these simple tips to:

1. Ensure that your Outlook data file does not get bloated, slow-down and eventually corrupt itself and die (causing possible loss of some if not all your e-mails)
2. Backup the *correct* Outlook data files in case of hardware failure
3. Organize your emails so that your E-mail Folders matches your paper filing structure
4. File your e-mails in a way that lets you quickly see all correspondence (incoming, out-going, to and from anyone) for a project quickly and easily in one place
5. Get some control over your e-mails and use your Inbox like a proper In-tray holding only the items that need your attention.
6. Easily archive e-mails for completed projects with other electronic documents (Word files, Excel files etc) for the same project.
7. Quickly find specific e-mails for a project.

The rest of this book is organized as a list of Tips. We recommend that you go through the tips in the order in which they are presented as they build on each other.

Tip 1: Turn Off Auto-Archiving in Outlook

You should archive e-mails as projects are completed. Don't disorganize yourself by archiving based on dates.

Time is wasted due to delays in trying to work out if the item I am looking for is in current or archive folders (Norman)

Outlook can automatically reduce the size of your data file by removing old e-mails and putting them in a separate file. **TURN THIS OFF NOW!**

We will show you a better method of archiving later.

Why shouldn't you use Auto Archive?

Your work is logically divided into projects or cases. Some projects can take months whereas others may take years. Until a project is complete, all e-mails for the project should be visible in one place.

Using Auto Archive will split your e-mails into multiple files which will compound the problem of finding e-mails while a project is active and of archiving e-mails once the project is completed.

To turn off Auto-Archiving:

Click Tools-Options

Select the Other Tab.

Click the AutoArchive... button.

Remove the tick next to Run AutoArchive.

Tip 2: Think carefully before using Outlook Rules

Rules can cause you to miss taking action on certain e-mails and also filing them into incorrect folders.

The two main problems with Rules are:

E-mails get moved out of the Inbox without you seeing them: Your Inbox is meant to be an action-list. It should show you, in one place, all e-mails that you still need to read and work on.

Rules shift e-mails out of your Inbox *before* you have a chance to see them. This means that you have to remember to check other folders for your action list which can result in e-mails getting over-looked.

E-mails get moved into the wrong folder: If you are working with the same person on more than one project, it is very difficult for an automated system to actually *decide* what project the e-mail relates to. There is no way to ensure that every e-mail for a project has a word in it that your Rules filter catches.

Tip 3: Find out where your Outlook data file is and backup regularly

How can you be sure that your Outlook data is being backed up if you don't know where it is?

I am frequently surprised with the number of users who have no idea where their Outlook data is actually saved on their computers.

Unless you are part of a corporate network using MS Exchange, all your Outlook data is stored in one Personal Folders file. This file has a .pst extension and is saved somewhere on your computer. This one file contains all your Outlook folders, e-mails, contacts, tasks, calendar items, journal entries and notes inside it.

So where is this file on your computer?

The exact location depends on the version of Outlook and Windows you are using but unfortunately it is almost never saved in a place you will remember to backup.

To find out where your Outlook data is:

Go to your Inbox and make sure that the list of folders is displayed
Right-click the top-level folder and select Properties
Click the Advanced button. The filename will be displayed in the box labeled FileName.

You need to make sure that you regularly backup this file to a CD, DVD or external hard-disk.

Tip 4: Split your Outlook data into more than one file

This technique will stop your e-mail file from getting bloated, slow and eventually corrupting itself and dying.

Outlook by default saves all its e-mails into one file.

Prior to Outlook 2003, there was a limitation of 2 GB to your Outlook data file. Although 2 GB seems like a lot, this space can be filled quickly particularly if you receive a lot of attachments.

Once you reach that limit, there is no real warning. Outlook just slows down, e-mails start getting lost and in some cases Outlook just stops opening altogether. Retrieving your e-mails from this corrupt PST is a nightmare.

In Outlook 2003, you have the option of using the new Unicode format of Outlook data file which can hold much more data. However if you upgraded Outlook from an earlier version then chances are that you are still using the older format with the 2 GB limitation.

Irrespective of whether you are using the new or old format data file, you should split your Outlook data into at least 2 files.

Your main PST file should not be used like a filing cabinet for old e-mails. Create a separate PST file to save e-mails that you want to keep for future reference. This leaves your main Outlook data file lean and mean so that Outlook is able to open up quickly.

To create a new Outlook data file:

Click File-New-Outlook Data File

Outlook 2003 Only: Outlook 2003 uses two types of Outlook data files. If you will be using the data only in Outlook 2003 or later, choose MS Outlook Personal Folders File. Otherwise choose the Outlook 97-2002 option.

Outlook suggests a default location for the file. I recommend that you change this to a folder that you backup regularly, possible a sub-folder in your My Documents.

Enter a filename and click OK to create the file.

You can create as many Personal Folder files as you need. Most users only need to create one in addition to the one that Outlook creates by default.

PST 1: Default Folder created by Outlook

PST 2: Use to store Project E-mails

You will be moving e-mails from PST 1 to PST 2 as explained later in this book.

If you have a very high volume of e-mails (particularly with large attachments) you may want to have 2 PST files for your Project E-mails, one for Active projects and one for Completed projects.

Tip 5: File your e-mails using the same folder structure for e-mails as you do for your paper files

Filing e-mails into folders makes it much quicker and easier to file, find and archive e-mails later.

My big problem is how to relate the received emails with the sent emails on the same topic or project. (Keith)

I have seen clients with thousands of e-mails in the Inbox and Sent Items folders. I have even seen clients using their Deleted Items folder to store old e-mails. Do you use your trash can to file your important papers?

Many of our clients file paper copies of their e-mails because they don't have a system for filing electronic copies. Even if you file paper copies of your e-mails, having an e-mail filing system will make it significantly faster and easier to locate correspondence.

How should you file your e-mails?

The same way you file paper documents – create a separate folder *inside Outlook* for each project and then file all e-mails for the project into the folder.

If you don't know how to create folders inside Outlook, please read the side-bar on the right.

You should use the *new PST file* created in the previous Tip to file your e-mails. This will ensure that the main PST file that Outlook uses stays small and fast.

We recommend the following folder structure. Create two folders in your Projects PST file called:

Active Projects
Completed Projects

(You can have other top level folders for other important areas in your life called Personal, etc)

Under the Active Projects folder create separate folders for each active project that you are working on. Whenever you receive or send an e-mail that you want to keep, move it to its appropriate project folder.

Name the folders anyway you like. The three common ways are:

Have a separate folder for each client
Have a separate folder for each project
Have a separate folder for each client and then have folders under it for each project for that particular client.

We use project based filing (and not client based filing at our office). However we name our folders in a way that makes it very easy to know both the project and client. Our folder naming convention is:

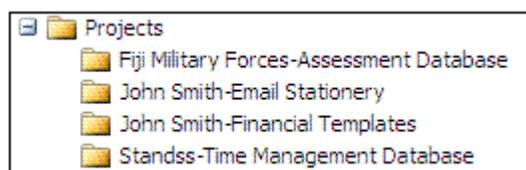
<Client>-<Project>

Using the above naming convention, your folders will look something like this:

Note that in the list, the user is working on two projects for John Smith.

How to create Folders *inside* Outlook

Click File-New-Folder to display the Create New Folder screen.
Enter a Name for your folder.
Select Mail & Post Items in the Folder Contains list.
Use the list displayed under "Select where to place the folder" to choose the folder's location.
Click OK. The folder will be created as a subfolder of the location you selected in the previous step



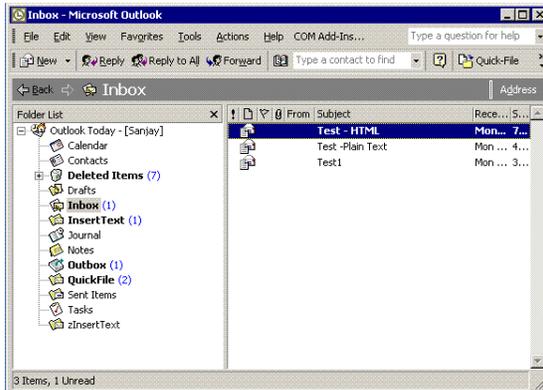
This structure works well because:

When you open the Projects folder, you get to see a list of all current projects in one place. Multiple Projects for a client are shown right next to each other because of the way the folders are named.

It is easy to archive old projects – When a project is completed simply drag its folder from the Projects folder to the Projects Completed folder. You don't need to then find the client folder first.

Tip 6: Setup Outlook so that it is easy to drag and drop e-mails to the correct folders

If you are not using QuickFile then the easiest way to move e-mails is to drag and drop.



Configure Outlook so that your list of folders is displayed next to your Inbox as shown on the left.

Viewing the list of folders beside the list of e-mails makes it much easier to drag e-mails from the Inbox/Sent Items to project folders.

To display the list of folders in Outlook 2000/2002:
Go to your Inbox
Click View on the menu
Click Folder List.

To display the list of folders in Outlook 2003:
Click Go on the menu
Click Mail.
If the Navigation Pane does not show:
Click View on the menu
Click Navigation Pane

To display the list of folders in Outlook 2007:
Click Go on the menu
Click Mail.
If the Navigation Pane does not show:
Click View on the menu
Click Navigation Pane - Normal

Tip 7: File things out of your Inbox as soon as you have read the e-mail

Your Inbox should only have e-mails that you need to take action on.

Once you have your folder structure in place, you are ready to shift e-mails out of your Inbox.

If you have left your e-mails in the Inbox until now, it may take you some time to move all the e-mails out to the appropriate folders. You can do it now or do it later but DO IT.

In the meantime make sure that at least the new e-mails that you receive are filed properly.

Ideally, you should move your e-mails out of your Inbox IMMEDIATELY after reading them.

Drag and drop the e-mails from the Inbox to the appropriate folder.

To drag and drop the original email:

Left - click on the e-mail that you want to shift.

Drag it to the appropriate folder on the folder List.

To drag and drop a copy of the email:

Right-click (instead of Left-click) and then drag and drop. When you drop the email (release the right mouse button) you will get presented with the option to Copy or Move. Click on Copy.

Tip 8: File (COPY) the e-mails out of your Sent Items folder

The e-mails that you write to your clients can be crucial for clarification and dispute resolution later.

E-mails that you send are moved from the Outbox to the Sent Items folder after they have been sent.

You must move or copy the e-mails that you want to keep for future reference from the Sent Items folder to the appropriate folders in your E-mail Filing System. Any remaining e-mails can be deleted (or left in the Sent Items folder if you want).

Our customers tell us that they prefer to have a copy of the email filed in the relevant project folder and also leave a copy in the Sent Items folder. This enables them to fill in timesheets at the end of the day, quickly answer queries about something sent in the last few days etc.

How do you copy emails instead of moving them? Right-click (instead of Left-click) and then drag and drop. When you drop the email (release the right mouse button) you will get presented with the option to Copy or Move. Click on Copy.

In our experience, **Sent e-mails are the Number 1 reason that E-mail Filing Systems fail** so... set aside some time periodically (at the end of the day or week) to move these e-mails to the correct folder.

Time to join the conversation – what do you think?

... so tell me, what did you think of this report.

Are you new to the system? I hope that you found the ideas worth implementing. Please tell us what you think.

Are you already following a similar system? Tell me what you like or dislike about it

Leave a comment (on our blog) using the following link.

<http://www.standss.com/t/0904/b.asp>

Would you do that for me right now? Thanks!

I am currently working on a follow-up report to this based on user experience and will do my best to include your ideas. The new report will focus on the difficulties people have with this email filing system... and their (and our) solutions. It will also contain additional tips from power users.

Keep your eyes peeled for the next report.

Sincerely
Sanjay Singh