E-Book

The Professional's Guide to Email Management in Microsoft Outlook

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

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Introduction

This e-book is intended for professionals who use Microsoft Outlook to write, read and manage business e-mails.

If you are a **Lawyer**, **Accountant**, **Engineer**, **Architect**, **Programmer**, **Web Developer**, in fact any professional who works on a Client, Project or Case basis, then you will learn **exactly what you need to be 100% certain** that *all* your e-mails are *safe from corruption and easily and quickly accessible* in the future?

This book will show you how 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

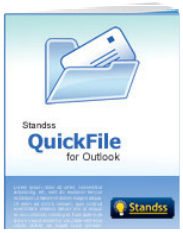
5. Get some control over your e-mails and use your Inbox like a proper In-tray holding only the items that need your attention.

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.

OPTIONAL: Use QuickFile 4Outlook to speed up and simplify your E-Mail Management System



The tips in this e-book do not require you to purchase any extra software – all you need is Microsoft Outlook.

However we have found that many e-mail management systems often fail because of the many pressing demands on a professional's time. Within weeks of starting, Outlook is often back to its familiar state, with hundreds of e- mails sitting in the Inbox and Sent Items folders.

QuickFile 4Outlook is an inexpensive Outlook add-on that works inside Microsoft Outlook by adding two buttons to the Outlook toolbar. It removes almost all extra effort required to file your e- mails thereby greatly increasing the chances that your e-mails stay organized.

You can download a fully functional version of QuickFile from www.standss.com.You can try QuickFile risk-free as it comes **with 90-Day No-Questions-Asked 100% Money-Back Guarantee**.

The Quick Reference card in Appendix A of this book has step by step instructions showing just how easy QuickFile is to use.

Tip 1: 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:

1. Go to your Inbox and make sure that the list of folders is displayed
2. Right-click the top-level folder and select Properties
3. 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 2: Turn Off Auto-Archiving in Outlook

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

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:

For Outlook 2003/2007:

1. Click Tools-Options
2. Select the Other Tab.
3. Click the Auto Archive button.
4. Remove the tick next to Run AutoArchive

For Outlook 2010:

1. Click File menu-Options
2. Select Advanced
3. Click on AutoArchive Settings…
4. Remove the tick next to Run AutoArchive

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Tip 3: 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:

For Outlook 2003/2007:

1. Click File-New-Outlook Data File
2. 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.
3. 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.
4. Enter a filename and click OK to create the file.

For Outlook 2010:

1. Click on Home tab
2. Select New Items-More Items-Outlook Data File...
3. 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.
4. 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.

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Tip 4: 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.

I have seen clients with thousands of e-mails in the Inbox and Sent Items folders. I have even seen clients using there 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.

How to create Folders inside Outlook

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

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 of 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.

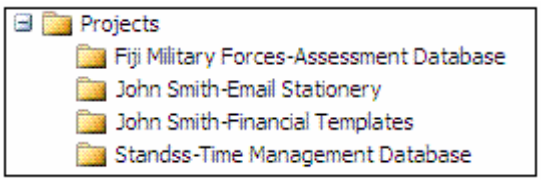
Name the folders anyway you like. The three common ways are:

1. Have a separate folder for each client
2. Have a separate folder for each project
3. 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:



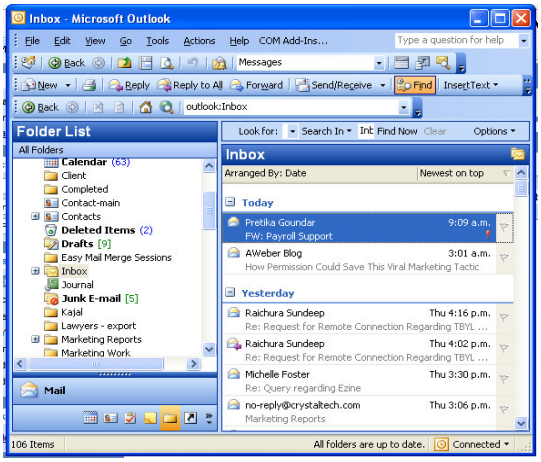
Note that in the list, the user is working on two projects for John Smith.

This structure works well because:

1. When you open the Projects folder, you get to see a list of all current projects in one place.
2. Multiple Projects for a client are shown right next to each other because of the way the folders are named.
3. 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 5: 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 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 2007/2010**:
Click View on the menu
Click Navigation Pane - Normal

BONUS TIP! Remove all effort required to file e-mails to the correct folders

Most E-Mail Filing Systems FAIL because of the extra time and effort needed to move e-mails to the correct folders – particularly from the Sent Items folder.

The filing method outlined in this report is based on creating and using separate folders for each of your e-mails. The standard method to move e-mails into these folders is by dragging and dropping.

Unfortunately this takes a lot of effort and many users find themselves slipping back to their old ways. The Sent Items folder is particularly easy to ignore as it isn't as "in your face" as the Inbox.

We created QuickFile 4Outlook in solve this very problem.
QuickFile 4Outlook is an inexpensive Outlook add-on that works inside Outlook by adding a few buttons to your Outlook.

It doesn't change Outlook in any other way.
It won't force you to change the way you have always used Outlook. It works on both incoming and out-going e-mails.

QuickFile is a fantastic time-saver for anyone who wants to use a client or project based filing system in Outlook.

Learn more about QuickFile and download a **fully-functional trial** copy from:
http://www.standss.com/quickfile/download_process.asp

See the ONE PAGE QUICKFILE TUTORIAL at the end of this e-book to see how easy QuickFile is to use.
Please give QuickFile a try. You will be amazed at how easy it is to continue using your e-mail filing system.

Tip 6: 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. If you are not

using QuickFile, drag the e-mails from the Inbox to the appropriate folder.

Remember, not everything needs to be kept. If you need to keep a copy of the e-mail then MOVE IT NOW to the appropriate folder. If not DELETE it.

QuickFile remembers where you file your e-mails so that you don't need to (hunt,) drag and drop. Simply click QuickFile after reading an e-mail and it will show you a list of folders where you file e-mails from this particular person. Select a folder and e-mail will be filed automatically.

Tip 7: File the e-mails in 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 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).

If you are not using QuickFile, you should set aside some time periodically (at the end of the day or week) to move these e-mails to the correct folder.

In our experience, **Sent e-mails are the Number 1 reason that E-mail Filing Systems fail**. It takes a lot of discipline to remember to file e-mails out of the Sent Items folder.

With QuickFile, you won't need to remember to file your Sent Items. Instead QuickFile lets you tell Outlook where your e-mail will be filed *when* sending it. The e-mail will automatically be filed to the correct folder after it is sent.

Tip 8: 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.

If you are using Outlook Rules, you may want to consider using a tool like QuickFile 4Outlook instead. The two main problems with Rules are:

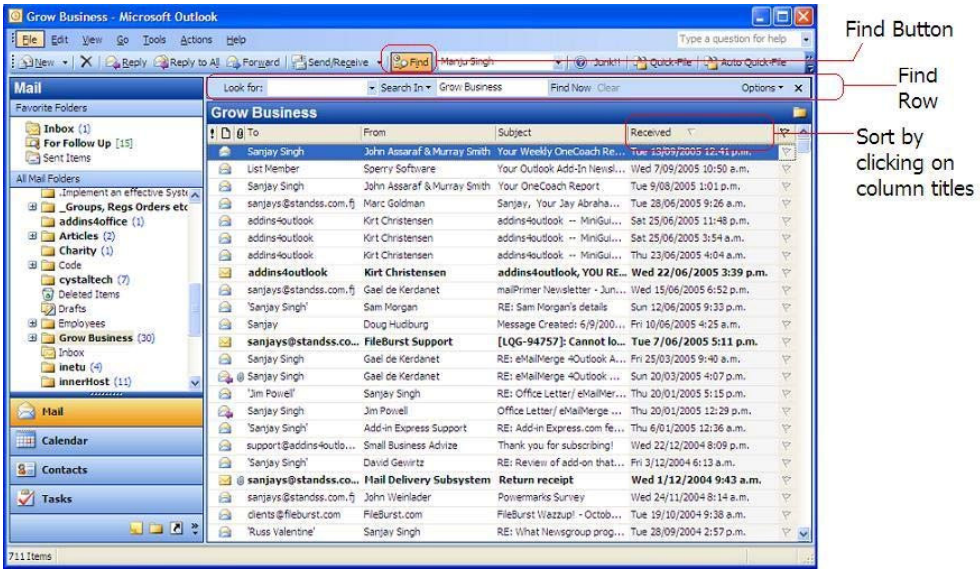
1. E-mails get moved out of the Inbox without you seeing them: Your Inbox is meant to be an action-list. It should show you, in one place, all e-mails that you still need to read and work on. Rules shift e-mails out of your Inbox *before* you have a chance to see them. This means that you have to remember to check other folders for your action list which can result in e-mails getting over-looked.

2. 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.

   Using a tool like QuickFile 4Outlook let *you decide* where the e-mail should be filed and only automates the actual filing.

Tip 9: Use Sorting and Simple Find to locate specific e-mails

Once your e-mails are in a project folders it is reasonably easy to find e-mails simply by looking through the folder.



You can click on column headings to change the sort order of the e-mails displayed e.g. you can click on the Received column to view the e-mails by date giving you a timeline of the e-mails. You can click on the To or From columns to sort e-mails on the recipient or sender.

In some cases you may want to use *Outlook's Find function* to look for specific e-mails in folders that have a lot of e-mails.

1. To access this function, go to the e-mail folder you are interested in and click the Find button on the toolbar. This places the Find Row at the top of the folder you are currently viewing.
2. Enter the text you are searching for in the Look For box.

3. If you are using Outlook 2000 or 2002, tick the Search All Text in the Message box. In Outlook 2003 or later, all text will be searched anyway.
4. Click the Find Now button.

Your e-mails will be filtered to only show the e-mails that have what you were searching for.

To show all e-mails again click on Clear or Clear Search.

Close the Find Toolbar once you are finished by clicking on the X on the right hand side of the toolbar or clicking on Find again.

Tip 10: Archive e-mails with other electronic documents

File all electronic documents including e-mails for a project in one place after the project is completed

When a project is complete, you may want to file all electronic documents for the project away in one place (most probably zipped up to save space)

You can export all e-mails for a project easily into a separate PST file if you have been using the Project based e-mail filing system outlined in this book.

For **Outlook 2003/2007**:

1. Click File-Import & Export.
2. Choose Export to a file and click Next.
3. Choose Personal Folder File (PST) and click Next.
4. Use the next screen to select the folder that contains your project e-mails.
5. Tick Include Subfolder if appropriate.
6. Click Next.
7. Click the Browse button to select a folder and enter a NEW filename. This is the file in which your e-mails for this project will be saved.
8. Click Finish.

For **Outlook 2010**:

1. Click File-Open-Import
2. Choose Export to a file and click Next.
3. Choose Outlook Data File (.pst) and click Next.
4. Use the next screen to select the folder that contains your project e-mails.
5. Tick Include Subfolder if appropriate.
6. Click Next.
7. Click the Browse button to select a folder and enter a NEW filename. This is the file in which your e-mails for this project will be saved.
8. Click Finish.

Even after exporting e-mails, I prefer to keep the e-mails in Outlook as well. However I separate my completed projects from active projects.

To do this I have a separate top level folder called Completed Projects. When a project is completed I drag its Project folder out of the Active Project folder and into the Completed Projects folder.

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Conclusion

Microsoft Outlook is the most widely used e-mail client by professionals around the world. The book has presented tips for the best way to setup Outlook for business e-mails. If you follow these tips, you will find that you have an E-mail Management System that is safe from corruption, organized and integrated with your core business functions.

QuickFile 4Outlook was introduced as an inexpensive easy-to-use Outlook add-on that greatly simplifies the day to day use of your e-mail system.

If you have any comments about this e-book or Outlook in general, please e-mail us on info@standss.com

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Standss is an international software vendor specializing in developing add-on products to Microsoft Outlook. We focus on reducing the time and steps needed to fully utilize Microsoft Outlook for your business. Find out more about Standss from the following addresses:

E-mail: info@standss.com
Website: www.standss.com

QuickFile for Outlook

QuickFile Reference and Tutorial Card

Introduction

QuickFile makes it easy to file incoming and outgoing e-mails.

QuickFile works inside Outlook by adding a new QuickFile toolbar.

There are only 3 things you need to remember to use QuickFile:

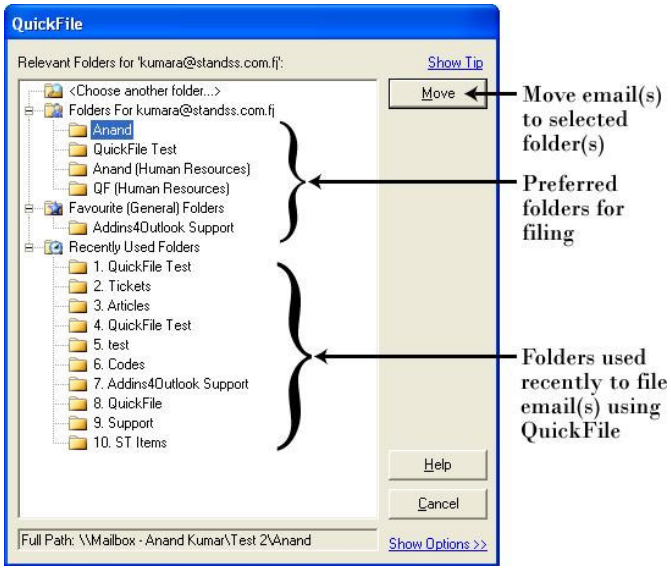
1. To file your incoming emails… click the QuickFile button.
2. To file outgoing emails… click the Send button and QuickFile will prompt you.
3. To quickly view the contents of an email folder… click the Find&Goto Folder button.

The QuickFile screens will display tips to get you started. For those who like printed manuals… the following sections have step-by-step instructions on QuickFile's main features.

QuickFile: Filing Received Emails

Use QuickFile to file e-mails from your Inbox or any other folder.

1. Select or open the e-mail to be filed.
2. Click the **QuickFile** button to display the QuickFile screen



   On the screen will be a list of preferred folders (if you had added any) for the specific contact that you want to file the email for.

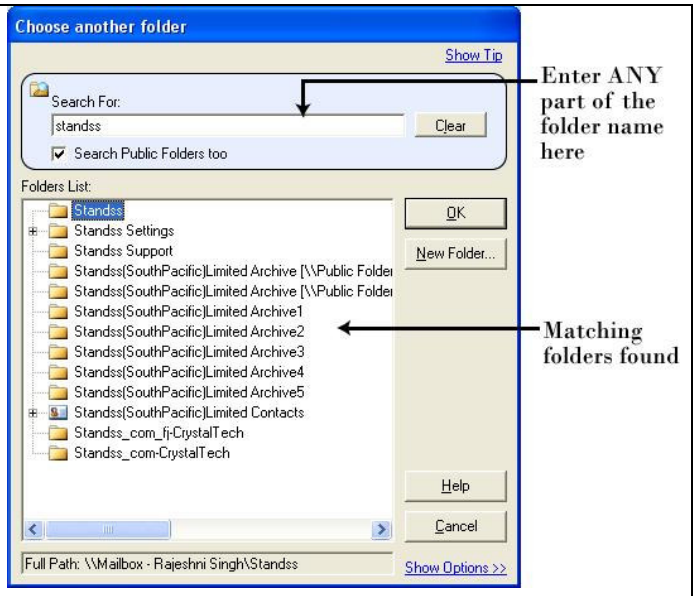
   If there were no preferred folders added for this contact then you will only have the **<**Choose another folder…**>** option in the list.

3. If the desired folder is not available in the list then go to step 5.
4. If the desired folder is shown in the list then select the folder and click the **Move** button (you can also double-click on the folder on the list).

   The e-mail will be closed and moved to the correct folder.

5. If the desired folder is not available in the list then double-click on **<**Choose another folder…**>** to select another folder.

   (Screen shown in next column)



6. Enter any part of the folder name in the **Search For:** box to display a list of matching folders.
7. Select the desired folder and click the **OK** button (you can also double-click on the folder on the list).

Send&File: File Outgoing Emails

Use QuickFile to create an e-mail and automatically file it to the correct folder after the e-mail is sent.

1. From your Inbox, click the **New** button to compose an e-mail.
2. Write your e-mail (Fill in the address, type the message, attach any files if necessary)
3. Click the **Send** button as you normally do. The *Send & File* screen will be displayed.
4. If the desired folder is not shown in the list then go to step 6
5. If the desired folder is shown in the list then select the folder and then click the **Send & File** button (you can also double-click on the folders on the list).

   The e-mail will be sent and filed.

6. If the desired folder does not exist then click **<**Choose another folder…**>** to select another folder.

   (The Choose Another Folder screen is shown in the image above)

7. Enter any part of the folder name in the **Search For:** box to display a list of matching folders.
8. Select the desired folder and click the **OK** button (you can also double-click on the folder on the list).

NOTES:

1. If you want to send the email without filing it, click **Send Only** on the Send&File screen.
2. If you want to delete the sent email after it is sent, click **Send&Delete** on the Send&File screen.
3. **Send&File** leaves a copy of the email in your Sent Items folder and files a copy into your selected folder. You can change this from the Settings screen.

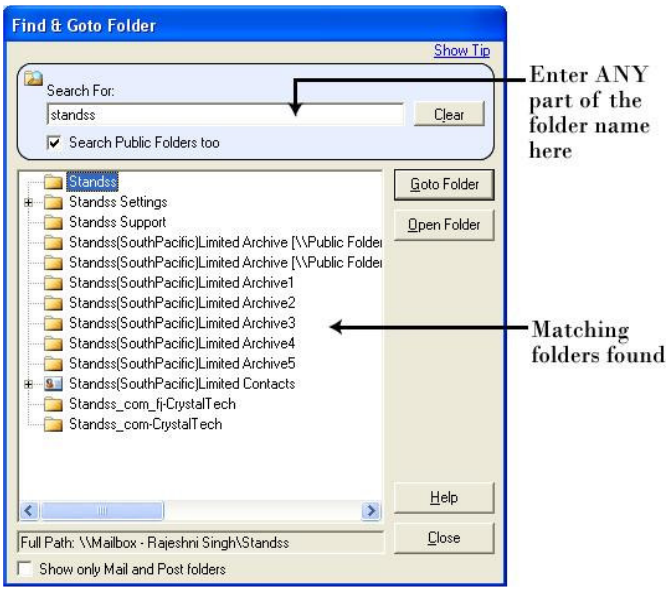
QuickFile for Outlook

QuickFile Reference and Tutorial Card

Find&Goto Folders

Immediately find and jump to any Outlook folder without having to hunt through complicated lists of folders.

1. Go to Inbox (or any Outlook Folder).
2. Click Find & Goto Folders button to display the Find Folders screen.

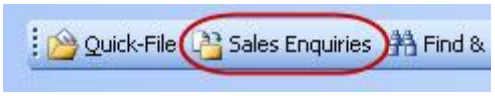


3. Type any part of the folder name into Search For: box. This does not need to be the start of the folder name. QuickFile will display a list of all folders matching the text you type in.
4. Select a Folder from the list.
5. Click Goto Folder to move to the folder (or click on Open Folder to open the selected folder in a new window).

One-Click Filing

QuickFile remembers the last used folder for a particular contact.

The one-click button beside the QuickFile button appears with the suggestion for the **last used folder** for a **selected email**.



Click the One Click button to move the selected email to the suggested folder.

Hold the SHIFT button and click the One Click button to copy the selected email to the folder i.e. the email will remain in the current folder but a copy will be filed.

Hold the CTRL button and click the One Click button to move to the folder i.e. the email will not be moved or copied but the contents of that folder will be displayed.

Advanced Tips... Once you're comfortable with the basics of QuickFile...

Auto-File Original Emails with Outgoing Replies...

If you are replying to an e-mail, QuickFile can automatically file the original email with the outgoing reply.

1. Write the email and click Send as you normally would.
2. Click on the **Show Options >>** link on the Send & File screen to expand the screen for more options.

3. Tick the option "File original Received Email with Sent Email".
4. Click Send & File to send the email and file the original email with the sent email.

Note: You can use the Settings screen to have the "File original Received Email with Sent Email" ticked by default.

Settings: Make QuickFile work YOUR WAY!

You can make QuickFile work the way you want by changing its settings.

1. Go to your Inbox.
2. On the QuickFile toolbar, click **More - Settings**.
3. Change the Settings as you want and click OK.

Clean up your list of preferred folders

Over time, your list of folders may contain folders that no longer exist. Let QuickFile clear your list for you.

1. Go to the Inbox.
2. On the QuickFile toolbar, click **More - Organize QF Shortcuts** button to display the QuickFile Organize Shortcuts screen.
3. Click the **Check Shortcuts** button.

Build the Preferred Folders List from Emails

QuickFile can scan your existing emails to learn your preferred folders.

1. Go to the Inbox.
2. On the QuickFile toolbar, click **More - Organize QF Shortcuts** button to display the QuickFile Organize Shortcuts screen.
3. Click the **Scan** button to display the AutoScan Wizard.
4. Follow the instructions on the Wizard.

This wizard will take time to run if there are a lot of emails to scan.

QuickFile for Outlook

QuickFile Reference and Tutorial Card

Task/Schedule received emails (PRO)

QuickFile allows you to create Tasks and Appointments from emails.

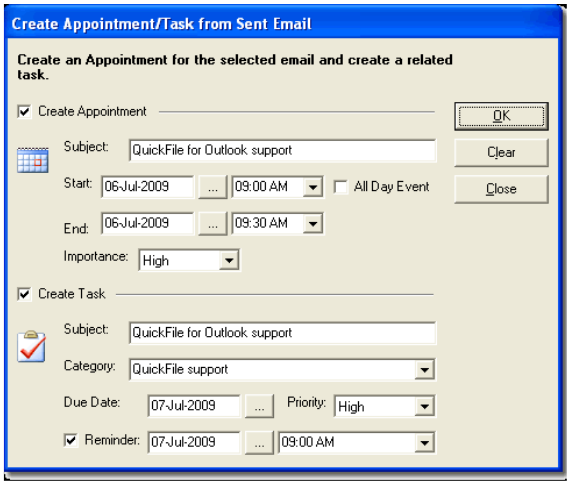
Quick-Task/Appointment

1. Select an email in your Inbox.
2. Click **Quick-Task/Appointment** on the QuickFile toolbar.
3. A task/appointment for that email opens up instantly.
4. You can edit your task/appointment as required and save it by clicking the **Save and Close** button on the Task/Appointment.

Task/Schedule outgoing emails (PRO)

QuickFile allows you to make Tasks and appointments for an outgoing email.

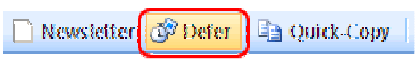
1. From your Inbox, click the **New** button to compose an e-mail as you normally would.
2. Click the **Send** button. The Send & File screen will be displayed.
3. Click the **Show Options >>** link on the screen to expand the form.
4. Click on **Task/Schedule it!** link to open the screen below:



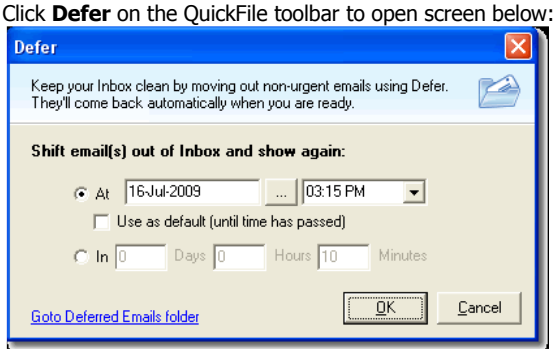
5. Place a tick in the respective checkboxes to make an Appointment and/or Task.
6. Fill in the required fields and click OK.
7. Click Clear to restore settings on this screen to default.
8. Click Close to close screen.
9. Click **Send&File, Send Only** or **Send&Delete** to send the email.

Defer emails (PRO)

Use the Defer button to keep your Inbox clean by moving out non-urgent emails out of your Inbox. They will arrive back automatically in your Inbox when you are ready.



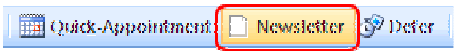
1. Select an email in your Inbox.(You can select multiple emails too)
2. Click **Defer** on the QuickFile toolbar to open screen below:



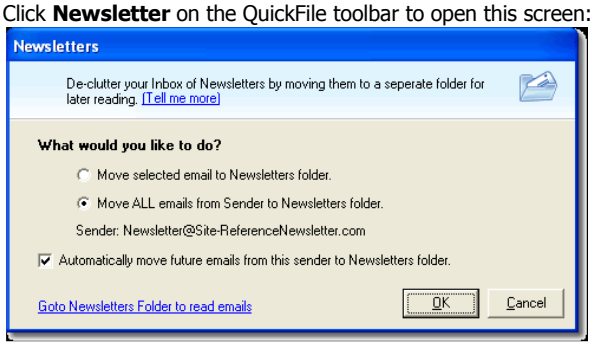
3. **Select** the option of your choice and set an appropriate time or interval to which you want to defer your email(s) to.
4. Click OK to defer the selected email (s) out of the Inbox
5. Your email(s) will be moved to a folder called **Deferred Emails (QuickFile)**, which resides under your default Inbox folder.
6. Your email (s) will appear back in your Inbox (Marked as unread) at the set time.
7. To go and view all your deferred emails, click on the **Goto Deferred Emails Folder** link on the screen above.

Newsletter emails (PRO)

De-clutter your Inbox of Newsletters by moving them to a separate folder for later reading.



1. Select an email in your Inbox
2. Click **Newsletter** on the QuickFile toolbar to open this screen:



3. To move the selected newsletter (email) from your Inbox to the newsletter folder, select **Move selected email to Newsletter folder** option and click OK button
4. To move selected newsletter (email) and all other newsletters from that sender, from the Inbox to the newsletter folder, select Move ALL emails from Sender to Newsletters folder option and click OK button.
5. To also add the Sender to QuickFile's Newsletter email list, tick the option **Automatically move future emails from this sender to Newsletter folder**. This option will allow QuickFile to automatically move future received emails from that Sender to the Newsletter folder.
6. To go and view all your newsletter emails, click on the **Goto Newsletter Folder to read emails** link.