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Diane Poremsky and Sherry Kinkoph Gunter

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Diane Poremsky and
Sherry Kinkoph Gunter

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Outlook® 2013 Absolute Beginner's Guide

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Diane Poremsky is the owner of Slipstick System's Outlook and Exchange Resource Center. She has provided support and training for Microsoft Outlook for the past 15 years. She is the author of several books and video training CDs. She also teaches online training classes. You can find her in the forums at OutlookForums.com and in Microsoft's Answers and TechNet forums.

Diane is a longtime Microsoft MVP (Most Valuable Professional) in recognition for her support of Outlook in the Microsoft forums and Internet community. She is often accused of knowing more about Outlook than many Microsoft employees.

Diane and her husband, Phil, live near the shores of Lake Erie, with their dog Henri. She spends her free time trying to keep up with the activities of her grandchildren, doing what every good grandparent does when they come for a visit: sugar them up before sending them home. She enjoys bird watching, gardening, and traveling. You can reach her at diane@slipstick.com and visit her websites at slipstick.com and outlook-tips.net. You can follow her on Twitter @dicot or @outlooktips.

Sherry Kinkoph Gunter has written and edited oodles of books over the past 20 years covering a wide variety of computer topics, including Microsoft Office programs, digital photography, and web applications. Her recent titles include *Word 2013 Absolute Beginner's Guide*, *Sams Teach Yourself Facebook in 10 Minutes*, *Easy Microsoft Word 2010*, and *Microsoft Office for Mac Bible*. Sherry began writing computer books back in 1992 for Macmillan, and her flexible writing style has allowed her to author for a varied assortment of imprints and formats. Sherry's ongoing quest is to aid users of all levels in the mastering of ever-changing computer technologies, helping users make sense of it all and get the most out of their machines and online experiences. Sherry currently resides in a swamp in the wilds of east central Indiana with a lovable ogre and a menagerie of interesting creatures.

Dedication

This book is dedicated to the memory of my parents, Ruth and Carl Cotner. I miss hearing mom ask, "Are you done with the book yet?" in our weekly phone calls.

—Diane

To my Mr. Gunter for helping to keep the swamp somewhat quiet during work hours.

—Sherry

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Yes, Mom, I'm finally done writing the book. Special thanks to my husband, Phil, and daughter, Cecilia, for their support during the time I was writing the book while working full time. It was great having someone else doing the cooking and cleaning. We had very little pizza and a lot of nutritious meals this time around. Cecilia even weeded my flower beds.

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To Vince Averello, my tech editor, thanks for catching all of my errors. Sometimes my fingers move faster than my brain. To Michelle, Ginny, Barbara, and Andy, thanks for everything.

Here's hoping it's the best Outlook book ever.

—Diane

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—Sherry

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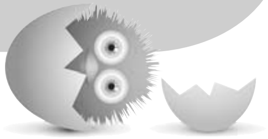
INTRODUCTION

INTRODUCTION



Microsoft Outlook is not the most intuitive program to use, even for people who've used it before. The basics of creating a new message are the same in every email client, but Outlook has so many features and options that it's easy to be overwhelmed by it. Our goal is to help you find your way around Outlook 2013 and turn you into an Outlook power user.

If you're new to Outlook, we'll introduce you to the features Outlook 2013 offers, not only for email, but also for Calendar, Contacts, and Tasks. If you're upgrading from an older version of Outlook, you'll learn about the new features in Outlook 2013 and discover some new tricks that will help you manage your life, or at least the part that is in Outlook.

By the time you are finished reading this book, you'll be more organized than ever and on the road to becoming an Outlook expert.

What's in This Book?

Beginning with an introduction to Outlook, you'll discover the features in Outlook 2013, including the Navigation pane, the Reading pane, Search Folders, and Quick Steps. You'll learn how to set up your accounts and customize Outlook.

Outlook is unlike any other email program. It supports common Internet email accounts using POP3 and IMAP protocols, free Outlook.com accounts, as well as corporate email hosted on Exchange Server. You'll learn about the other features that make Outlook the most powerful messaging client available, such as voting, message tracking, and deferred delivery. Outlook's Junk E-mail filter automatically removes most of the spam you receive from your Inbox as it's downloaded, eliminating much of the spam before it takes over your life. We'll show you how to set up your accounts and use email in Chapters 1-6.

Although Outlook is a first-rate email client, it does more than just email. With Calendar, Contacts, and Tasks, it's also a personal information manager (PIM). You'll learn how to use these features to their fullest. Learn how to use categories to organize your contacts and calendar, and use your contacts in a mail merge. Finally, you will learn how to create recurring appointments and send meeting requests. We'll show you how to use Calendar, Contacts, and Tasks in Chapters 7-9.

And let's not forget the Social Connector—with LinkedIn and Facebook enabled, you'll see your contacts' smiling faces as you read their email messages and see your contact's LinkedIn and Facebook photos and status updates in Outlook. You can learn about the Social Connector in Chapter 10.

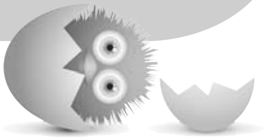
Integration with other Office programs and online services is important to many users. In Chapters 12 and 13, we show you how to link SharePoint lists to Outlook and use Outlook contacts in Word. You can learn how to use mail merge in Chapter 20.

Managing your email is easier when you use the tools Outlook provides: Color Categories, Instant Search, Search Folders, and Rules. Views are one of our favorite power-user features, and we'll show you how to work with the views that Outlook includes and how to create your own custom views. You'll find this in Chapters 14-17.

In Chapter 18, we'll show you how to print your email, calendar, and contacts. Learn about Outlook data files and how to back up your email, calendar, and contacts in Chapter 19.

IN THIS CHAPTER

- Organizing messages into folders
- Automating your Inbox with Quick Steps
- Sending incoming email to different folders for easy organizing
- Stopping junk email from reaching your Inbox
- Archiving old messages so they don't languish in your mail folders
- Learning how to look for a message in a haystack



5

MANAGING EMAIL

As your email messages start piling up, you eventually need to plan out ways to manage them or your Inbox is going to seem like it's bursting at the seams. Thankfully, Outlook makes it easy to choose how you want to organize and store messages. In fact, this is where Outlook puts the word "manage" in personal information manager and kicks it into high gear.

Although it may be tempting to let messages turn into a mountain in your Inbox, don't. You can opt for a variety of handy methods for dealing with them efficiently:

- Store messages in special folders so they stay neat and tidy (OCD people are going to love this one).
- Delete messages you don't want to keep so your Inbox isn't clogged.

- Archive messages to move older messages out of the way, yet keep them available if needed again.
- Thin down your incoming deluge of messages by creating rules to sort email.
- Weed out junk mail before it even makes it into the Inbox.
- Route messages to the right places using Quick Steps.

In this chapter, you'll learn essential techniques for keeping ahead of your email stack.

Organizing Messages with Folders

In case you haven't noticed yet, every message you receive for a particular email service appears in the account's Inbox folder listed over in the Folder pane. You're not stuck using just your Inbox to contain your messages. You can use the folder structure hierarchy to organize and manage email into logical containers. In the same way you use folders to organize files on your computer, you can use folders in Outlook to store and sort email messages.

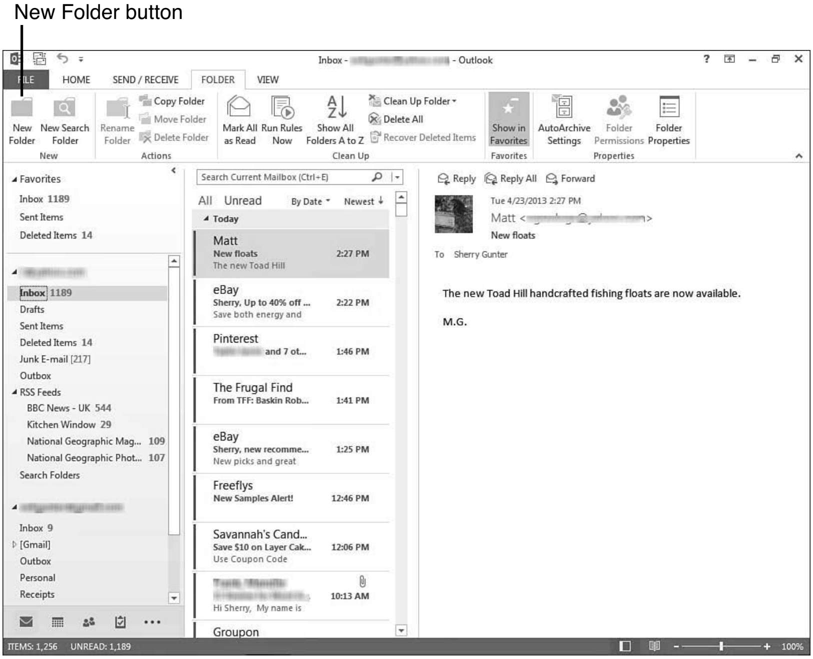
Each email account includes a set of default folders, one of which is the main Inbox for the account where your messages tend to pile up. Other folders may include Drafts, Sent Items, Deleted Items, Junk E-mail, and Outbox. (These may vary depending on your email service.) Most of the preexisting folders are self-explanatory based on their names alone, but you can also add more folders to help you better organize your messages. For example, you may want to keep all your departmental emails in a folder labeled Sales Department, or all of your business correspondence in a folder labeled Clients. You can create as many folders as you need, even for temporary projects and tasks.

TIP You can learn more about using folders to organize other Outlook items in Chapter 15, "Using Folders." Meanwhile, in this section, we'll focus strictly on using folders for email messages.

Making a New Email Folder

Follow these steps to create a new folder:

1. With the Mail module displayed onscreen, click the Inbox folder under the email service you want to add a folder to (see Figure 5.1).
2. Click the Folder tab on the ribbon.
3. Click the New Folder button.


New Folder button
Inbox - - Outlook
FILE
HOME
SEND / RECEIVE
FOLDER
VIEW
New Folder
New Search Folder
New
Rename Folder
Copy Folder
Move Folder
Delete Folder
Actions
Mark All as Read
Run Rules Now
Show All Folders A to Z
Clean Up Folder
Delete All
Recover Deleted Items
Clean Up
Show in Favorites
Favorites
AutoArchive Settings
Folder Permissions
Folder Properties
Properties
Favorites
Inbox 1189
Sent Items
Deleted Items 14
Inbox 1189
Drafts
Sent Items
Deleted Items 14
Junk E-mail [217]
Outbox
RSS Feeds
BBC News - UK 544
Kitchen Window 29
National Geographic Mag... 109
National Geographic Phot... 107
Search Folders
Inbox 9
[Gmail]
Outbox
Personal
Receipts
Search Current Mailbox (Ctrl+E)
All
Unread
By Date
Newest
Today
Matt
New floats
The new Toad Hill
2:27 PM
eBay
Sherry, Up to 40% off ...
Save both energy and
2:22 PM
Pinterest
and 7 ot...
1:46 PM
The Frugal Find
From TFF: Baskin Rob...
1:41 PM
eBay
Sherry, new recomme...
New picks and great
1:25 PM
Freeflys
New Samples Alert!
12:46 PM
Savannah's Cand...
Save $10 on Layer Cak...
Use Coupon Code
12:06 PM
10:13 AM
Hi Sherry, My name is
Groupon
Reply
Reply All
Forward
Tue 4/23/2013 2:27 PM
Matt
New floats
To Sherry Gunter
ITEMS: 1,256
UNREAD: 1,189
100%

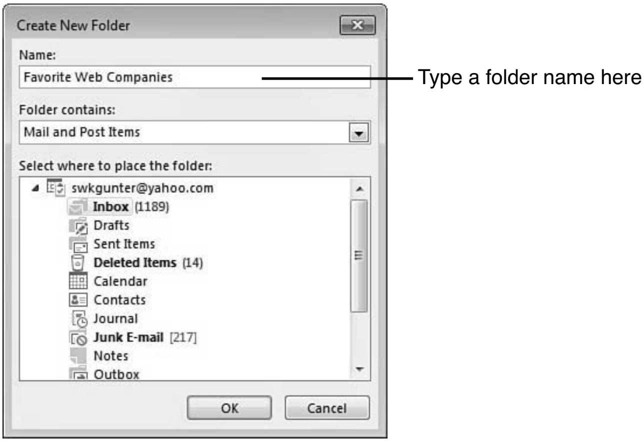
The new Toad Hill handcrafted fishing floats are now available.

M.G.

FIGURE 5.1

Start by choosing which email account you want to add a folder to.

4. Outlook opens the Create New Folder dialog box, as shown in Figure 5.2. Type a name for the new folder in the Name box.


Create New Folder

Name: Favorite Web Companies

Folder contains: Mail and Post Items

Select where to place the folder:

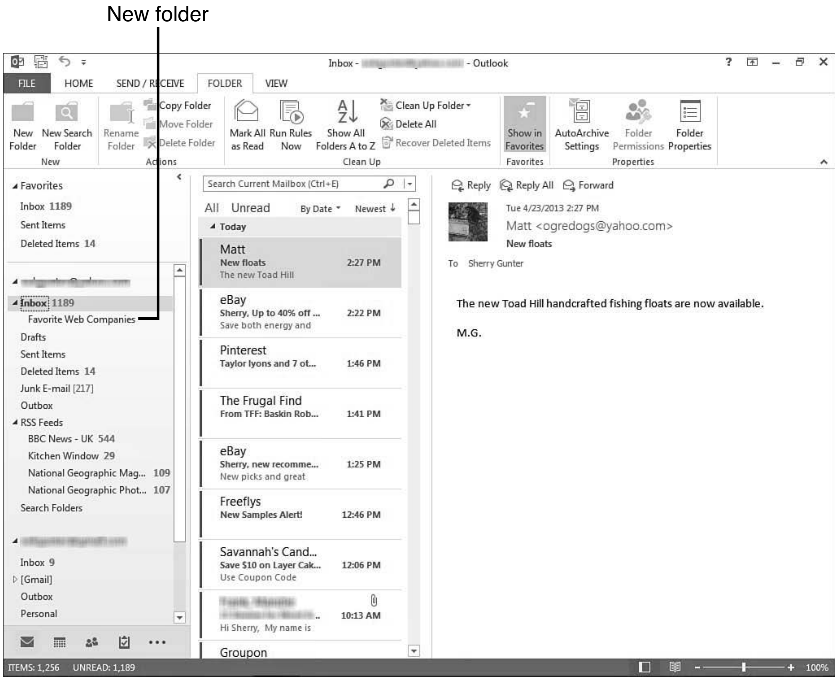
swkgunter@yahoo.com
Inbox (1189)
Drafts
Sent Items
Deleted Items (14)
Calendar
Contacts
Journal
Junk E-mail [217]
Notes
Outbox
OK
Cancel
Type a folder name here

FIGURE 5.2

Use the Create New Folder dialog box to make new folders.

5. Leave the other settings intact (Mail and Post Items is selected in the Folder Contains box, and the Inbox you selected in step 1 is highlighted in the Select Where to Place the Folder list box).
6. Click OK.

Outlook adds the new folder to the Folder pane, similar to Figure 5.3. Now you can start moving messages to the folder as needed.


New folder

Inbox - [redacted] - Outlook

Tue 4/23/2013 2:27 PM
Matt <ogredogs@yahoo.com>
New floats
To Sherry Gunter

The new Toad Hill handcrafted fishing floats are now available.

M.G.

FILE
HOME
SEND / RECEIVE
FOLDER
VIEW
New Folder
New Search Folder
New
Rename Folder
Copy Folder
Move Folder
Delete Folder
Actions
Mark All as Read
Run Rules Now
Show All Folders A to Z
Clean Up Folder
Delete All
Recover Deleted Items
Clean Up
Show in Favorites
Favorites
AutoArchive Settings
Folder Permissions
Folder Properties
Properties
Favorites
Inbox 1189
Sent Items
Deleted Items 14
[redacted]
Inbox 1189
Favorite Web Companies
Drafts
Sent Items
Deleted Items 14
Junk E-mail [217]
Outbox
RSS Feeds
BBC News - UK 544
Kitchen Window 29
National Geographic Mag... 109
National Geographic Phot... 107
Search Folders
[redacted]
Inbox 9
[Gmail]
Outbox
Personal
Search Current Mailbox (Ctrl+E)
All
Unread
By Date
Newest
Today
Matt
New floats
The new Toad Hill
2:27 PM
eBay
Sherry, Up to 40% off ...
Save both energy and
2:22 PM
Pinterest
Taylor lyons and 7 ot...
1:46 PM
The Frugal Find
From TFF: Baskin Rob...
1:41 PM
eBay
Sherry, new recomme...
New picks and great
1:25 PM
Freeflys
New Samples Alert!
12:46 PM
Savannah's Cand...
Save $10 on Layer Cak...
Use Coupon Code
12:06 PM
[redacted]
10:13 AM
Hi Sherry, My name is
Groupon
Reply
Reply All
Forward
ITEMS: 1,256
UNREAD: 1,189
100%

FIGURE 5.3

Outlook adds the new folder to the list.

TIP You can also right-click the Inbox name and choose New Folder from the context menu that pops up; then type in a new folder name directly without using the Create New Folder dialog box.

TIP Adding folders is a key part of using some of Outlook's other message management features, such as rerouting incoming emails to designated folders. Sometimes it helps to plan out ahead of time what types of folders you might need later, such as a work project or important client you're corresponding with. You can always remove folders you no longer need and archive any old messages.

Moving a Message to Your New Folder

To move a message to a folder, you can drag and drop it in place. You can also use this method:

1. Click the title of the message you want to move.
2. Click the Home tab.
3. Click the Move button.
4. Select the name of the folder where you want to place the message (see Figure 5.4).

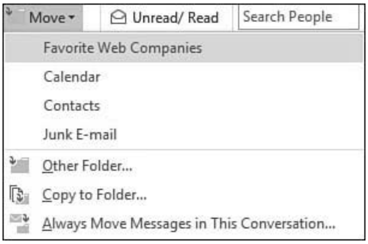

Move
Unread/ Read
Search People
Favorite Web Companies
Calendar
Contacts
Junk E-mail
Other Folder...
Copy to Folder...
Always Move Messages in This Conversation...

FIGURE 5.4

Use the Move menu to move selected messages around in your folder structure.

If the folder you want to use isn't listed in the Move menu, click the Other Folder option and use the Move Items dialog box to choose your folder.

Working with Folder Contents

While we're on the subject of folders, let's go over the ways you can work with them, view their contents, and purge contents you no longer want to keep.

- To view any folder in your Folder pane, click the folder name. The Mail module immediately displays a list of contents, and if the Reading pane is displayed, you can view entire messages.
- To rename a folder you've added yourself, click its name twice and type in a new name, or right-click it and choose Rename Folder.

- To remove a custom folder, right-click it and choose Delete Folder (see Figure 5.5).

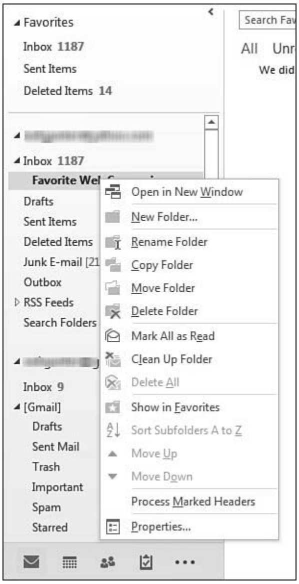

Favorites
Inbox 1187
Sent Items
Deleted Items 14
Inbox 1187
Favorite Wel
Drafts
Sent Items
Deleted Items
Junk E-mail [21
Outbox
RSS Feeds
Search Folders
Inbox 9
[Gmail]
Drafts
Sent Mail
Trash
Important
Spam
Starred
Search Fav
All Unr
We did
Open in New Window
New Folder...
Rename Folder
Copy Folder
Move Folder
Delete Folder
Mark All as Read
Clean Up Folder
Delete All
Show in Favorites
Sort Subfolders A to Z
Move Up
Move Down
Process Marked Headers
Properties...

FIGURE 5.5

Oh, that handy right-click menu— it's a time-saver.

- To move the folder, right-click the folder name, choose Move Folder, and then choose where to move it.
- You can copy a folder. Right-click the folder name and choose Copy Folder, and then tell Outlook where to copy it to.
- To remove a message from a folder, right-click it and choose Delete or press the Delete key, or click the Delete button on the Home tab. So many deletes. As soon as you activate a Delete command, Outlook moves the message to the Deleted Items folder.
- To empty out your Deleted Items folder, right-click the folder name and choose Empty Folder. A prompt box appears, telling you that you're about to delete stuff forever. Click Yes to make it happen.
- To clean out your Junk E-mail folder, right-click the folder and choose Clean Up Folder. A prompt box appears, warning you that you're about to move messages to the Deleted Items folder; click Clean Up Folder to proceed.

TIP Your Sent Items folder keeps a copy of all the emails you send. This feature is turned on by default, which makes it a nice safeguard in case you need to find a message later.

You can learn more about working with Outlook folders in Chapter 15, including how to manage other data types in them.

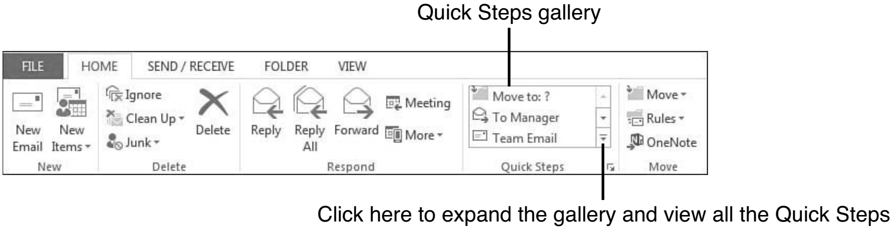
Routing Messages with Quick Steps

You can use Outlook's Quick Steps feature to perform multiple actions on your email messages with just one click. For example, you might want to flag a message for follow up later *and* move it to a special folder. Rather than do the two actions separately, why not do them at the same time? That's where Quick Steps come into play.

Outlook stores Quick Steps in the Quick Steps gallery on the **Home** tab when you're using the Mail module. You can scroll through the gallery to view them or expand the gallery to view all of them at once. Outlook even includes a few preset Quick Steps you can take advantage of:

- **Move To**—If you find yourself moving messages to the same folder over and over, designate it as the Move To folder and use this Quick Step to immediately relocate messages.
- **To Manager**—This opens a message form that's automatically preset with a designated recipient, such as your manager (hence the name), along with the forwarded message.
- **Team Email**—Use this Quick Step to send a new message to everyone on a team. All the member's email addresses are saved and preloaded in the form window, ready to go.
- **Done**—This marks the selected message as read, completed (with a Mark Complete flag), and moves it to a designated folder—three things at once.
- **Reply and Delete**—This one opens a reply form to send back a reply and also moves the original message to the Deleted Items folder.

To practice using one of the default Quick Steps, you can try out the one that moves messages. While viewing your Inbox messages in the Mail module, select the message you want to dispatch (click it or tap it to select it). Next, make sure the Home tab is displayed and click the Move to: ? Quick Step from the Quick Step gallery, as shown in Figure 5.6. If the Move to: ? option isn't in view, scroll through the gallery to locate it.


FILE
HOME
SEND / RECEIVE
FOLDER
VIEW
New Email
New Items
New
Ignore
Clean Up
Junk
Delete
Delete
Reply
Reply All
Forward
Meeting
More
Respond
Move to: ?
To Manager
Team Email
Quick Steps
Move
Rules
OneNote
Move

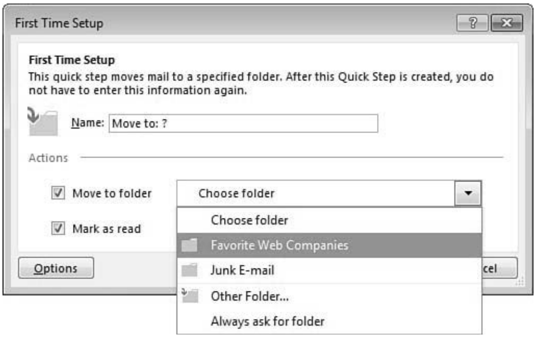
Quick Steps gallery

Click here to expand the gallery and view all the Quick Steps

FIGURE 5.6

Use the Quick Steps gallery to apply automated tasks to your messages.

When you activate the option, the First Time Setup dialog box appears, similar to Figure 5.7. The same box opens for some of the other Quick Steps the first time you use them. That's because you need to specify people or folders first so Outlook can carry out the actions. To designate a folder to move the selected message to, click the drop-down arrow and specify a folder name.


First Time Setup

First Time Setup

This quick step moves mail to a specified folder. After this Quick Step is created, you do not have to enter this information again.

Name: Move to: ?

Actions

☑ Move to folder: Choose folder

☑ Mark as read

Choose folder
Favorite Web Companies
Junk E-mail
Other Folder...
Always ask for folder
Options
cel

FIGURE 5.7

Use the First Time Setup dialog box to tell Outlook which folder to move messages to.

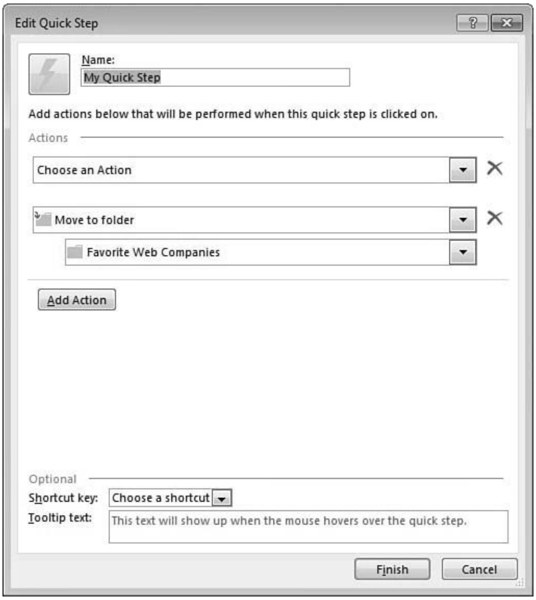
The Mark as Read check box is also conveniently selected. You can leave it checked if you want to consider the message read; uncheck it if you want to move it and treat it as not read yet.

Finally, click the Save button. Outlook saves the folder name as your designated folder and adjusts the Quick Step name accordingly. The next time you want to move a message, click the option listed in the Quick Steps gallery, and Outlook takes care of the relocation for you. You can use the Quick Steps gallery on the Home tab to make your selection, or you can right-click the message, choose Quick Steps, and then choose the name of your step.

TIP Need to make a folder? Back up to the previous section to learn how to add folders to your Inbox to organize messages.

As you can imagine, you can create different Quick Steps to handle various ways you want to process email messages. You can move, copy, and delete messages, change their status from read to unread, assign categories and flags, generate automatic message responses, turn them into appointments, and so on. You can assign as many actions to a Quick Step as you want.

To build a custom Quick Step, choose the Create New option from the Quick Steps gallery. This opens the Edit Quick Step dialog box, shown in Figure 5.8, and you can choose actions, folders, even type out ToolTip text to pop-up to remind you what the step does when you hover the mouse pointer over the Quick Step name. Yes, those Microsoft people have thought of everything.



Edit Quick Step

Name: My Quick Step

Add actions below that will be performed when this quick step is clicked on.

Actions

Choose an Action

Move to folder

Favorite Web Companies

Optional

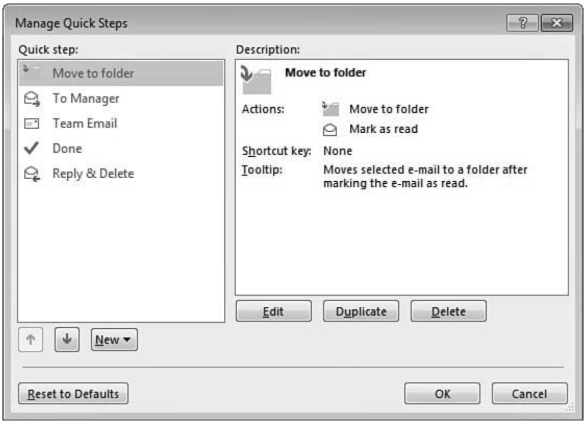
Shortcut key: Choose a shortcut

Tooltip text: This text will show up when the mouse hovers over the quick step.

FIGURE 5.8

Build your own Quick Steps with the tools in this dialog box.

You can open the Manage Quick Steps dialog box (see Figure 5.9) to make changes to actions associated with Quick Steps or remove Quick Steps you no longer want. From the Quick Steps gallery, select the Manage Quick Steps option to display the dialog box. Choose which Quick Step you want to edit, then click the Edit button to make changes to the associated actions, or click the Delete button to remove it entirely from the list. You can also duplicate a Quick Step and tweak it slightly to create a new step. Go wild and make Quick Steps for everything—it's fun.



Manage Quick Steps

Quick step:

- Move to folder
- To Manager
- Team Email
- Done
- Reply & Delete

Description:

Move to folder

Actions: Move to folder
Mark as read

Shortcut key: None

Tooltip: Moves selected e-mail to a folder after marking the e-mail as read.

FIGURE 5.9

Manage your Quick Steps from this dialog box.

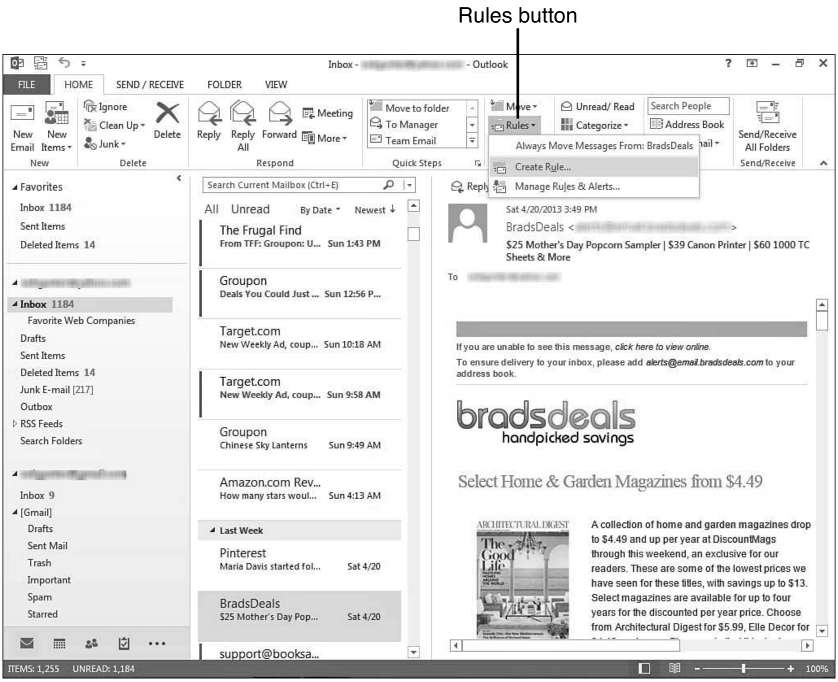
TIP What? Don't like the order of your Quick Steps in the gallery? Reorder them in the Manage Quick Steps dialog box. Use the arrow buttons to reposition how a step is listed in the bunch.

Managing Incoming Messages with Rules

How would you like to set a few rules for your email messages, such as telling all the emails from a certain friend to go jump in a Boring folder, or put all the messages from your boss into a Do This Now folder? You can set rules in Outlook that help you sort through your email and put them in special locations, among other actions. Rules can help you move, copy, delete, reply to, forward, and redirect your email. You can choose from Outlook's preset rules or create brand new ones. Are you ready to lay down the law? Let's break out the rule book.

You can build rules with help from Outlook's Rules Wizard, a step-by-step process for creating a rule (click the Advanced Options button in the Create Rule dialog box to summon the wizard for help). However, one of the easiest ways to build a rule is to grab an example of an existing message you want to create a rule for, such as an email from a certain person that you always want routed to a certain folder, and build on it. With the Mail module displayed, follow these steps:

1. Select the message you want to turn into a rule.
2. Click the Home tab.
3. Click Rules (see Figure 5.10).



Rules button

Inbox - [redacted] - Outlook
FILE
HOME
SEND / RECEIVE
FOLDER
VIEW
New Email
New Items
New
Ignore
Clean Up
Junk
Delete
Delete
Reply
Reply All
Forward
Meeting
More
Respond
Move to folder
To Manager
Team Email
Quick Steps
Move
Rules
Unread/ Read
Categorize
Search People
Address Book
Send/Receive All Folders
Send/Receive
Always Move Messages From: BradsDeals
Create Rule...
Manage Rules & Alerts...
Favorites
Inbox 1184
Sent Items
Deleted Items 14
[redacted]
Inbox 1184
Favorite Web Companies
Drafts
Sent Items
Deleted Items 14
Junk E-mail [217]
Outbox
RSS Feeds
Search Folders
[redacted]
Inbox 9
[Gmail]
Drafts
Sent Mail
Trash
Important
Spam
Starred
Search Current Mailbox (Ctrl+E)
All
Unread
By Date
Newest
Last Week
Reply
ITEMS: 1,255
UNREAD: 1,184
100%

The Frugal Find
From TFF: Groupon: U... Sun 1:43 PM

Groupon
Deals You Could Just ... Sun 12:56 P...

Target.com
New Weekly Ad, coup... Sun 10:18 AM

Target.com
New Weekly Ad, coup... Sun 9:58 AM

Groupon
Chinese Sky Lanterns Sun 9:49 AM

Amazon.com Rev...
How many stars woul... Sun 4:13 AM

Pinterest
Maria Davis started fol... Sat 4/20

BradsDeals
$25 Mother's Day Pop... Sat 4/20

support@booksa...

Sat 4/20/2013 3:49 PM
BradsDeals <[redacted]>
$25 Mother's Day Popcorn Sampler | $39 Canon Printer | $60 1000 TC Sheets & More
To [redacted]

If you are unable to see this message, *click here to view online*.

To ensure delivery to your inbox, please add *alerts@email.bradsdeals.com* to your address book.

bradsdeals
handpicked savings

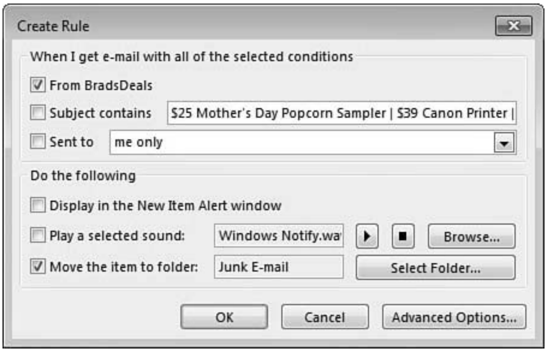
Select Home & Garden Magazines from $4.49

A collection of home and garden magazines drop to $4.49 and up per year at DiscountMags through this weekend, an exclusive for our readers. These are some of the lowest prices we have seen for these titles, with savings up to $13. Select magazines are available for up to four years for the discounted per year price. Choose from Architectural Digest for $5.99, Elle Decor for

FIGURE 5.10

Activate the Rules menu to find the Create Rule command.

4. Click Create Rule to open the Create Rule dialog box, shown in Figure 5.11.
5. Use the conditions check boxes to set the criteria for the email. You can specify messages from that particular sender, identify subject matter to recognize, or who the message was originally sent to, for example.
6. Under the Do the Following group, choose what you want Outlook to do when it encounters these same message types in the future, such as moving them to a specified folder.
7. Click OK and the rule is set for any incoming messages resembling the criteria you specified.



Create Rule

When I get e-mail with all of the selected conditions

☑ From BradsDeals

☐ Subject contains: $25 Mother's Day Popcorn Sampler | $39 Canon Printer |

☐ Sent to: me only

Do the following

☐ Display in the New Item Alert window

☐ Play a selected sound: Windows Notify.wa

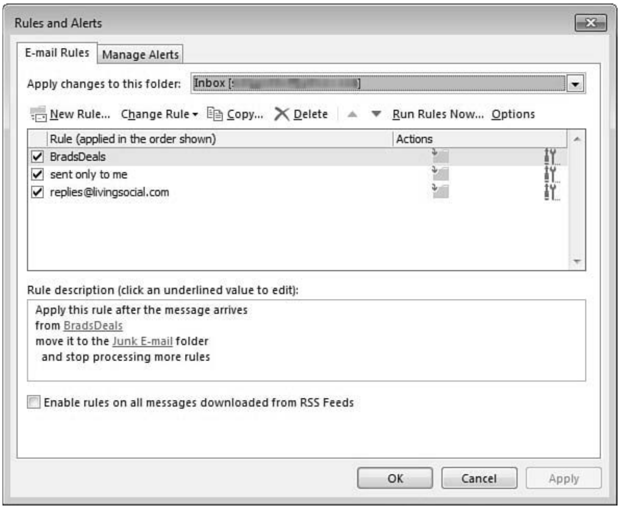
☑ Move the item to folder: Junk E-mail

FIGURE 5.11

The Create Rule dialog box is the place to set criteria for a message rule.

8. Outlook asks if you want to run the rule immediately. Click the check box and click OK to do so, or click OK to exit without running the rule yet.

You can manage any rules you create with a little help from the Rules and Alerts dialog box, shown in Figure 5.12. To find your way to this box, click the Rules drop-down arrow on the Home tab and choose Manage Rules and Alerts. You can also access the box through Outlook's Backstage view; click the File tab, click Info, and then click Manage Rules and Alerts.



Rules and Alerts

Apply changes to this folder: Inbox [[redacted]]

Rule (applied in the order shown)	Actions
☑ BradsDeals	
☑ sent only to me	
☑ replies@livingsocial.com	

Rule description (click an underlined value to edit):

Apply this rule after the message arrives
from BradsDeals
move it to the Junk E-mail folder
and stop processing more rules

☐ Enable rules on all messages downloaded from RSS Feeds

FIGURE 5.12

Manage your rules with the Rules and Alerts dialog box.

- To turn off a rule, deselect its check box.
- To remove a rule, select it and click the Delete button.
- To edit a rule, select it and choose Change Rule, Edit Rule Settings.
- To add a new rule, click New Rule.

When you finish with rules, click OK to exit the dialog box.

Controlling Junk Email

Junk email is a broad term covering advertising emails, unsolicited bulk emails, spam, or just about anything sent to your email address without your consent. Billions of spam emails are sent daily, and they're not always just about advertising something. Spam email can also be criminal in nature, generated by hackers and "phishers" trying to steal your identity or personal information for nefarious reasons. Thwarting junk email from reaching your Inbox requires some filtering on Outlook's part. Although it can't catch everything all the time, Outlook's filtering tools do a pretty good job of sorting out the bad stuff and placing it in a special folder marked for such unworthy messages.

You can even fine-tune the sensitivity settings to low or high to suit your needs. Choose from the following options:

- **No Automatic Filtering**—This setting means there's no filtering happening at all. Junk mail can flow freely into your Inbox.
- **Low**—Some junk mail still gets through, but the worst of it is tossed away.
- **High**—The most ruthless setting; nothing gets through, sometimes not even legitimate emails (be sure to check the Junk E-mail folder periodically to see if anything important gets tossed in by mistake).
- **Safe Lists Only**—This setting allows only emails from specified companies and individuals (from your safe recipients list) to make it into your Inbox. You have to identify senders first in a special Safe Senders list (sort of like a guest list for your email, and only the invitees make it into the party).

In addition to setting a filtering level, you can also choose to go ahead and permanently delete junk email when it's found, disable links in suspected phishing messages, or display a warning prompt for suspicious domain names for a heads up.

To adjust your junk mail settings, follow these steps:

1. From the Mail module, click the Home tab. If you have more than one email service, select the account's Inbox first.
2. Click the Junk drop-down arrow, shown in Figure 5.13.

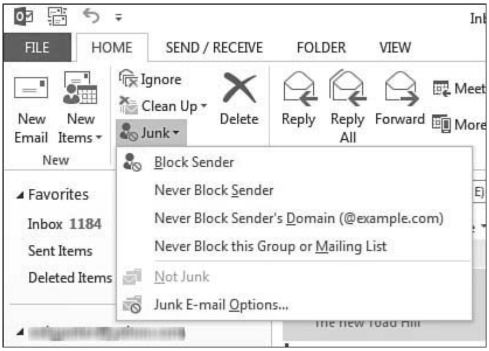
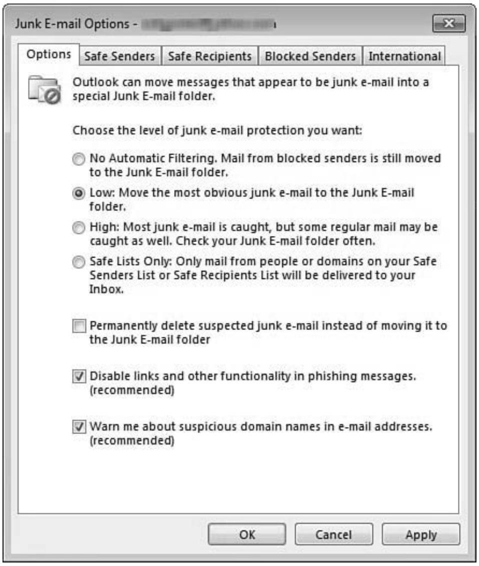

FILE
HOME
SEND / RECEIVE
FOLDER
VIEW
New Email
New Items
New
Ignore
Clean Up
Junk
Delete
Reply
Reply All
Forward
Meet
More
Favorites
Inbox 1184
Sent Items
Deleted Items
Block Sender
Never Block Sender
Never Block Sender's Domain (@example.com)
Never Block this Group or Mailing List
Not Junk
Junk E-mail Options...

FIGURE 5.13

Look for the Junk drop-down menu on the Home tab.

3. Click Junk E-mail Options. The Junk E-mail Options dialog box opens to the Options tab, as shown in Figure 5.14.


Junk E-mail Options - [redacted]
Options
Safe Senders
Safe Recipients
Blocked Senders
International

Outlook can move messages that appear to be junk e-mail into a special Junk E-mail folder.

Choose the level of junk e-mail protection you want:

○ No Automatic Filtering. Mail from blocked senders is still moved to the Junk E-mail folder.

● Low: Move the most obvious junk e-mail to the Junk E-mail folder.

○ High: Most junk e-mail is caught, but some regular mail may be caught as well. Check your Junk E-mail folder often.

○ Safe Lists Only: Only mail from people or domains on your Safe Senders List or Safe Recipients List will be delivered to your Inbox.

☐ Permanently delete suspected junk e-mail instead of moving it to the Junk E-mail folder

☑ Disable links and other functionality in phishing messages. (recommended)

☑ Warn me about suspicious domain names in e-mail addresses. (recommended)

OK
Cancel
Apply

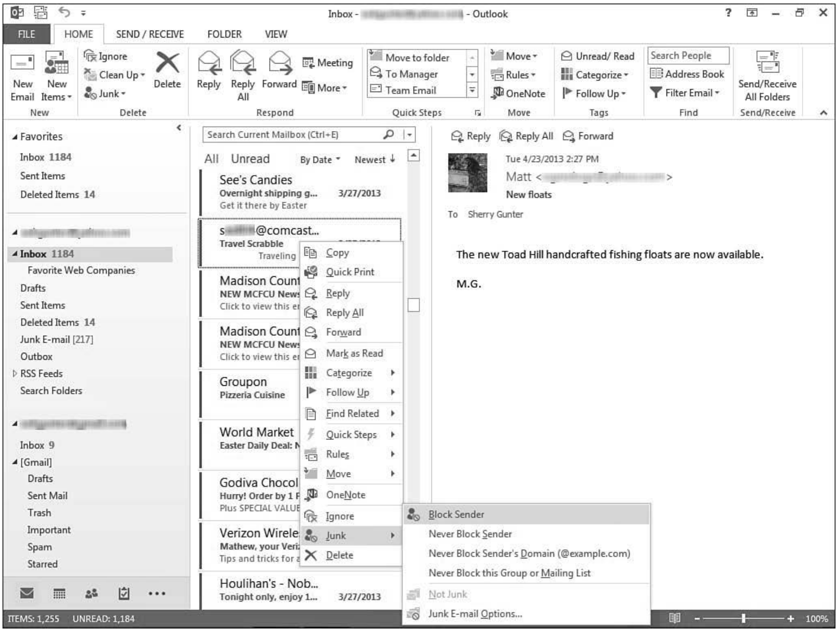
FIGURE 5.14

Set any junk email protection levels in this dialog box.

4. Click a protection level.
5. Click OK.

You can also help Outlook identify junk email by pointing it out when you find it in your Inbox. Right-click the icky message from the list, click Junk, then choose the Block Sender option.

If you find the filter dumping legitimate messages into the Junk E-mail folder, display the folder's contents (click the folder name in the Folder pane), right-click the message from the list, and choose Never Block Sender or Not Junk (see Figure 5.15).


Inbox - - Outlook
FILE
HOME
SEND / RECEIVE
FOLDER
VIEW
New Email
New Items
Ignore
Clean Up
Junk
Delete
Reply
Reply All
Forward
Meeting
More
Move to folder
To Manager
Team Email
Move
Rules
OneNote
Unread/ Read
Categorize
Follow Up
Search People
Address Book
Filter Email
Send/Receive All Folders
New
Delete
Respond
Quick Steps
Move
Tags
Find
Send/Receive
Favorites
Inbox 1184
Sent Items
Deleted Items 14
Inbox 1184
Favorite Web Companies
Drafts
Sent Items
Deleted Items 14
Junk E-mail [217]
Outbox
RSS Feeds
Search Folders
Inbox 9
[Gmail]
Drafts
Sent Mail
Trash
Important
Spam
Starred
Search Current Mailbox (Ctrl+E)
All
Unread
By Date
Newest
See's Candies
Overnight shipping g...
3/27/2013
Get it there by Easter
s@comcast...
Travel Scrabble
Traveling
Madison Count
NEW MCFCU News
Click to view this e
Madison Count
NEW MCFCU News
Click to view this e
Groupon
Pizzeria Cuisine
World Market
Easter Daily Deal: N
Godiva Chocol
Hurry! Order by 1 F
Plus SPECIAL VALUE
Verizon Wirele
Mathew, your Veri
Tips and tricks for a
Houlihan's - Nob...
Tonight only, enjoy 1...
3/27/2013
Copy
Quick Print
Reply
Reply All
Forward
Mark as Read
Categorize
Follow Up
Find Related
Quick Steps
Rules
Move
OneNote
Ignore
Junk
Delete
Block Sender
Never Block Sender
Never Block Sender's Domain (@example.com)
Never Block this Group or Mailing List
Not Junk
Junk E-mail Options...
Reply
Reply All
Forward
ITEMS: 1,255
UNREAD: 1,184
100%

Tue 4/23/2013 2:27 PM
Matt < >
New floats
To Sherry Gunter

The new Toad Hill handcrafted fishing floats are now available.

M.G.

FIGURE 5.15

Un-junk a legitimate message using the right-click menu.

TIP If you're concerned Outlook might identify email messages from someone as junk, like the weekly family updates from Uncle Marvin, you can add the individual to your Safe Recipient's list. From the Junk E-Mail Options dialog box (see Figure 5.14), click the Safe Recipients tab and click Add, and then type in the user's address.

Archiving Messages

Sure, deleting old messages is a great way to clean out your Inbox, but sometimes you need to hang on to your messages for posterity, or in case you need to refer to them again to recall an exchange. You can archive messages, sort of like putting them into storage, but without the mothballs or monthly rental fee.

You can archive manually or automate the task. Outlook's AutoArchive tool is perfect for taking care of archiving tasks in the background without any help from you. You can set different archiving tasks for different folders. For example, you can instruct the tool to automatically archive messages in your Inbox that are older than 3 months and move them to a special archive folder.

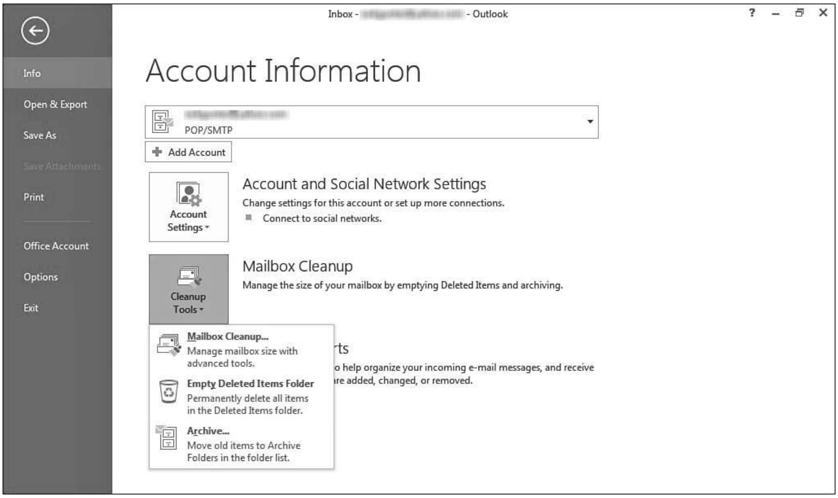
By default, Outlook is set up to archive messages to a file named archive.pst. You can specify another location for your archive files as well as specify more descriptive filenames.

Manually Archive Messages

If you're doing a little folder cleaning, you can manually archive messages. For example, you might be wrapping up a work project and need to put all the email messages associated with it into an archive file.

To manually archive messages, follow these steps:

1. Click the File tab.
2. Click Info.
3. Click Cleanup Tools (see Figure 5.16).
4. Click Archive to open the Archive dialog box shown in Figure 5.17.
5. Click the folder you want to archive.
6. Choose a cutoff date, such as items older than 6 months.
7. Choose an archive file location (click the Browse button, navigate to the location, and specify a more descriptive filename), or use the default filename and locations.
8. Click OK, and Outlook archives the messages.


Inbox - - Outlook
Info
Open & Export
Save As
Save Attachments
Print
Office Account
Options
Exit
Add Account
Account Settings
Cleanup Tools
Mailbox Cleanup...
Empty Deleted Items Folder
Archive...

Account Information

POP/SMTP

Account and Social Network Settings

Change settings for this account or set up more connections.

- Connect to social networks.

Mailbox Cleanup

Manage the size of your mailbox by emptying Deleted Items and archiving.

Mailbox Cleanup... Manage mailbox size with advanced tools.

Empty Deleted Items Folder Permanently delete all items in the Deleted Items folder.

Archive... Move old items to Archive Folders in the folder list.

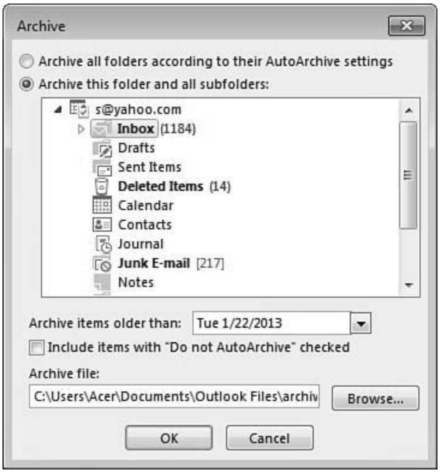
rts

o help organize your incoming e-mail messages, and receive

re added, changed, or removed.

FIGURE 5.16

Use the Backstage view to find your way to Outlook's cleanup tools.


Archive
s@yahoo.com
Inbox (1184)
Drafts
Sent Items
Deleted Items (14)
Calendar
Contacts
Journal
Junk E-mail [217]
Notes
Browse...
OK
Cancel

○ Archive all folders according to their AutoArchive settings

● Archive this folder and all subfolders:

Archive items older than: Tue 1/22/2013

☐ Include items with "Do not AutoArchive" checked

Archive file: C:\Users\Acer\Documents\Outlook Files\archiv

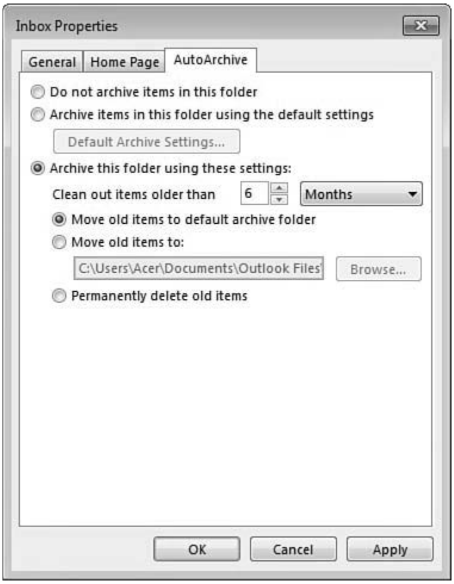
FIGURE 5.17

Use the Archive dialog box to manually archive old messages.

Setting Up Automatic Archiving

You can instruct Outlook to perform automatic archiving for you. You can set automatic archiving for individual folders or the Inbox in general. To set up automatic archiving, follow these steps:

1. Select the folder or subfolder you want to archive, such as your Inbox or an old project folder.
2. Click the Folder tab.
3. Click the AutoArchive Settings button.
4. Outlook opens the Junk E-mail Properties dialog box to the AutoArchive tab of tools, as shown in Figure 5.18. Click Archive this folder using these settings option.



○ Do not archive items in this folder
○ Archive items in this folder using the default settings
● Archive this folder using these settings:
Clean out items older than 6 Months
● Move old items to default archive folder
○ Move old items to:
C:\Users\Acer\Documents\Outlook Files
○ Permanently delete old items

FIGURE 5.18

Use the AutoArchive feature to automatically archive old messages.

5. Specify the age of the messages, such as older than 3 months.
6. Specify a location for the archived file, or use the default location.
7. Click OK.

Each folder can have its own archiving settings, which is handy if you don't want some folders tampered with, but others are good to square away.

TIP Want to check out how much room is being consumed in your Inbox? Switch over to Backstage view (click the File tab) and click the Cleanup Tools button, then click Mailbox Cleanup. This opens the Mailbox Cleanup dialog box. Click the View Mailbox Size button to check out how much room is taken up by your messages in the various folders. Based on what you see, you may decide you need to clean up some folders and archive old messages.

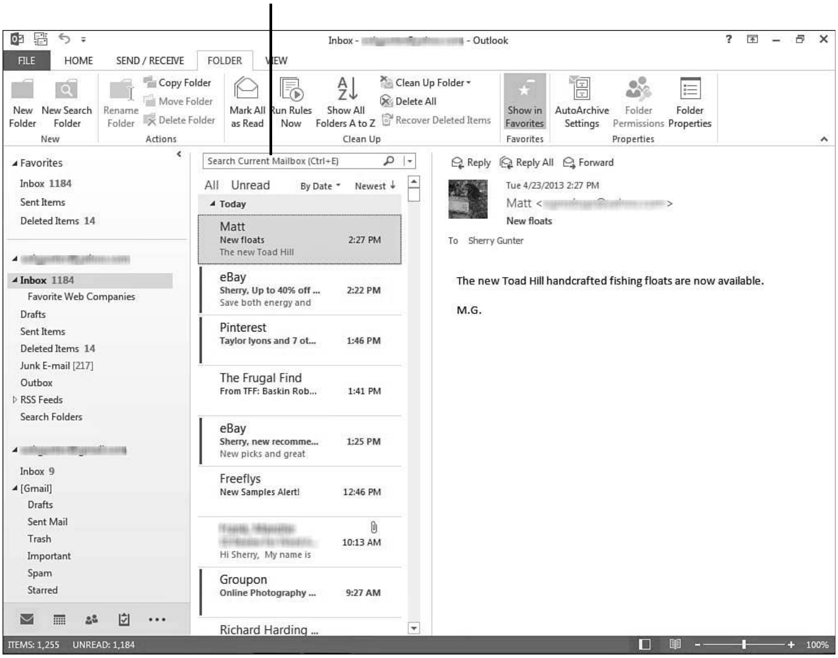
Searching for Messages

As your digital stack of email grows, so does the inevitable need to search through them for a particular message. If you're worried that searching for a message may be like looking for a needle in a haystack, don't sweat it. Outlook has tools you can use to look for messages. In fact, Outlook taps into the Windows Search technology, which means you can even search for Outlook items from the Windows Start menu (Windows 7) or using the Windows 8 search screen.

TIP You can learn more about searching for Outlook items in Chapter 16, "Using Search."

Conducting a Quick Search

When you select an Inbox to view in the Mail module, a search box appears at the top of the list, much like the one found in Figure 5.19. You can click in the box and type any keyword or words you want to search for, whether it's a name, subject title, or a word within the message body. As soon as you start typing, Outlook starts searching. Any matches are listed, newest emails first, similar to Figure 5.20. Outlook also opens a Search tab on the ribbon with additional search tools you can access and apply.


Search box

Inbox - - Outlook
FILE
HOME
SEND / RECEIVE
FOLDER
VIEW
New Folder
New Search Folder
New
Rename Folder
Copy Folder
Move Folder
Delete Folder
Actions
Mark All as Read
Run Rules Now
Show All Folders A to Z
Clean Up Folder
Delete All
Recover Deleted Items
Clean Up
Show in Favorites
Favorites
AutoArchive Settings
Folder Permissions
Folder Properties
Properties
Favorites
Inbox 1184
Sent Items
Deleted Items 14
Inbox 1184
Favorite Web Companies
Drafts
Sent Items
Deleted Items 14
Junk E-mail [217]
Outbox
RSS Feeds
Search Folders
Inbox 9
[Gmail]
Drafts
Sent Mail
Trash
Important
Spam
Starred
Search Current Mailbox (Ctrl+E)
All
Unread
By Date
Newest
Today
Reply
Reply All
Forward
ITEMS: 1,255
UNREAD: 1,184
100%

Matt — New floats — 2:27 PM — The new Toad Hill

eBay — Sherry, Up to 40% off ... — 2:22 PM — Save both energy and

Pinterest — Taylor lyons and 7 ot... — 1:46 PM

The Frugal Find — From TFF: Baskin Rob... — 1:41 PM

eBay — Sherry, new recomme... — 1:25 PM — New picks and great

Freeflys — New Samples Alert! — 12:46 PM

10:13 AM — Hi Sherry, My name is

Groupon — Online Photography ... — 9:27 AM

Richard Harding ...

Tue 4/23/2013 2:27 PM
Matt <>
New floats
To Sherry Gunter

The new Toad Hill handcrafted fishing floats are now available.

M.G.

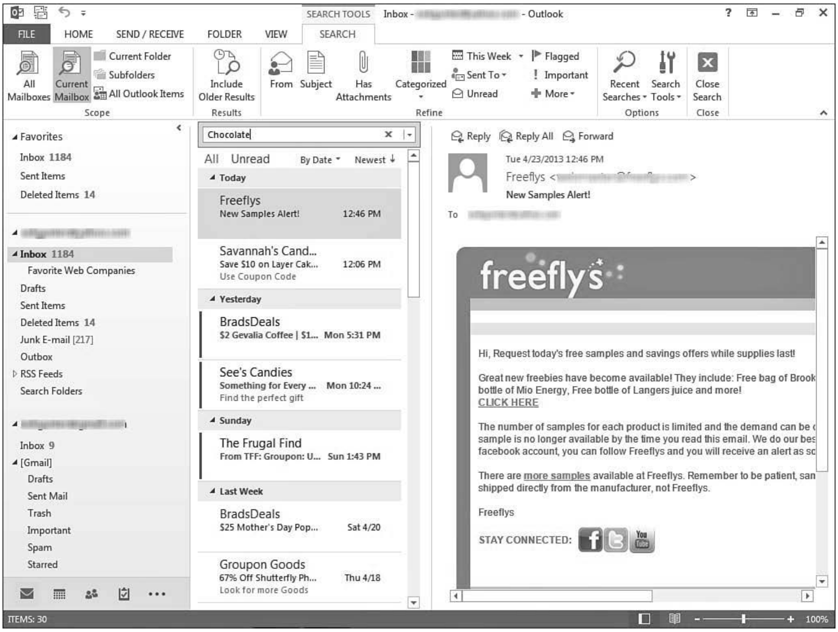
FIGURE 5.19

Use the search box at the top of the message list to search for messages in that particular Inbox or folder.

You can narrow the search by adjusting the keyword or words you search for, or by tweaking the search criteria, such as searching subject lines or recipient names. To add search criteria, select among the Refine group of tools on the Search tab and then type in your refining keyword or words in the search box, similar to Figure 5.21. You can also click the drop-down arrow on the search box to change which folder or Inbox you search.

When you finish with your search, click the Close Search button on the Search tab.

TIP Performing a sort can help you find messages by subject, name, or date. To perform a quick sort, click the sort category at the top of your message list, such as Subject or From. If you turn off the Reading Pane, you can view more sort categories.


SEARCH TOOLS
Inbox - - Outlook
FILE
HOME
SEND / RECEIVE
FOLDER
VIEW
SEARCH
All Mailboxes
Current Mailbox
Current Folder
Subfolders
All Outlook Items
Scope
Include Older Results
Results
From
Subject
Has Attachments
Categorized
This Week
Sent To
Unread
Flagged
Important
More
Refine
Recent Searches
Search Tools
Options
Close Search
Close
Favorites
Inbox 1184
Sent Items
Deleted Items 14
Inbox 1184
Favorite Web Companies
Drafts
Sent Items
Deleted Items 14
Junk E-mail [217]
Outbox
RSS Feeds
Search Folders
Inbox 9
[Gmail]
Drafts
Sent Mail
Trash
Important
Spam
Starred
All
Unread
By Date
Newest
Today
Yesterday
Sunday
Last Week
Reply
Reply All
Forward
To
freeflys
STAY CONNECTED:
ITEMS: 30
100%

Chocolate

Freeflys New Samples Alert! 12:46 PM

Savannah's Cand... Save $10 on Layer Cak... 12:06 PM Use Coupon Code

BradsDeals $2 Gevalia Coffee | $1... Mon 5:31 PM

See's Candies Something for Every ... Mon 10:24 ... Find the perfect gift

The Frugal Find From TFF: Groupon: U... Sun 1:43 PM

BradsDeals $25 Mother's Day Pop... Sat 4/20

Groupon Goods 67% Off Shutterfly Ph... Thu 4/18 Look for more Goods

Tue 4/23/2013 12:46 PM

Freeflys <

New Samples Alert!

Hi, Request today's free samples and savings offers while supplies last!

Great new freebies have become available! They include: Free bag of Brook bottle of Mio Energy, Free bottle of Langers juice and more!

CLICK HERE

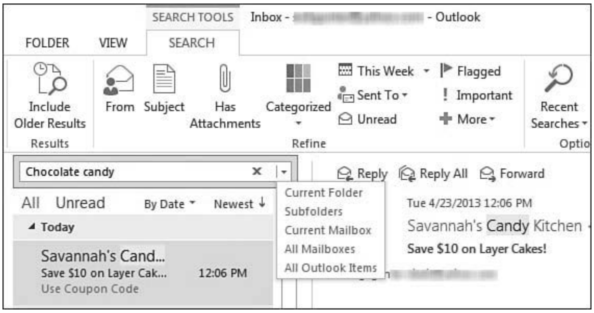
The number of samples for each product is limited and the demand can be sample is no longer available by the time you read this email. We do our bes facebook account, you can follow Freeflys and you will receive an alert as sc

There are more samples available at Freeflys. Remember to be patient, san shipped directly from the manufacturer, not Freeflys.

Freeflys

FIGURE 5.20

Outlook displays possible matches and opens a Search tab of tools.


SEARCH TOOLS
Inbox - - Outlook
FOLDER
VIEW
SEARCH
Include Older Results
Results
From
Subject
Has Attachments
Categorized
This Week
Sent To
Unread
Flagged
Important
More
Refine
Recent Searches
Optio
Reply
Reply All
Forward
All
Unread
By Date
Newest
Today
Current Folder
Subfolders
Current Mailbox
All Mailboxes
All Outlook Items

Chocolate candy

Savannah's Cand... Save $10 on Layer Cak... 12:06 PM Use Coupon Code

Tue 4/23/2013 12:06 PM

Savannah's Candy Kitchen

Save $10 on Layer Cakes!

FIGURE 5.21

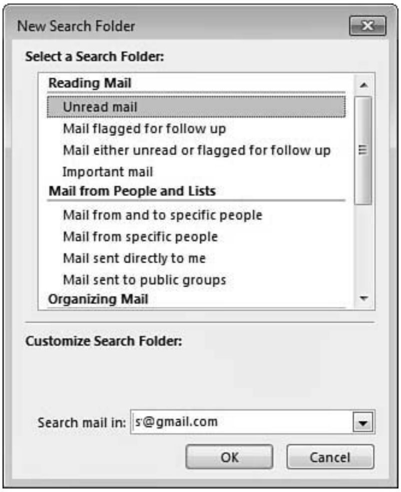
Use the Refine group of tools to refine your search further.

Making Search Folders

You can use Outlook's Search folders to speed up searching tasks. A Search folder gives you a spot to look for certain kinds of messages regardless of where they're actually located. It's rather like a catalog of messages pertaining to a set of criteria. Search folders can save you quite a bit of time and energy otherwise searching through a vast amount of messages. Plus, after they're established, Outlook keeps your Search folders up to date.

Outlook offers several preset Search folders you can use. For example, the Mail Flagged for Follow Up folder shows only messages you've flagged, whereas the Unread Mail folder shows only messages you haven't read yet.

To create a custom search folder, click the New Search Folder button on the Folder tab. The New Search Folder dialog box opens, similar to Figure 5.22. Choose the type of Search folder you want to add. If you're making a custom folder, click the Choose button to fill in any additional information required by the type. When you finish filling out details, click OK.


New Search Folder
Select a Search Folder:
Reading Mail
Unread mail
Mail flagged for follow up
Mail either unread or flagged for follow up
Important mail
Mail from People and Lists
Mail from and to specific people
Mail from specific people
Mail sent directly to me
Mail sent to public groups
Organizing Mail
Customize Search Folder:
OK
Cancel

Search mail in: s@gmail.com

FIGURE 5.22

The New Search Folder dialog box.

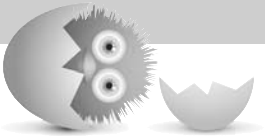
To search your Search folder, click the folder name and a list of messages immediately appears. To exit the folder, click the Inbox again.

See Chapter 16 to learn more about searching in Outlook.

THE ABSOLUTE MINIMUM

Now you know how to manage and organize your vast pile of accumulating email messages. In this chapter, you learned the following:

- You can use Outlook's folder hierarchy to organize messages in an orderly fashion; just add new folders when you need them and move messages around.
- Use Outlook's Quick Steps to perform multiple actions on your messages, such as sending particular ones to a certain folder and flagging them with priority status.
- You can use message rules to direct the flow of incoming email, such as sending messages from your colleague to a project folder or sending routing messages from your brother-in-law to an Avoid Reading folder.
- Turn on Outlook's filtering tools to stop the flow of junk email to your Inbox.
- You can archive older messages to get them out of the way, yet keep them available if you need to refer to them again.
- You can search for a message using the Search box at the top of the message list, easy-peasy.



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