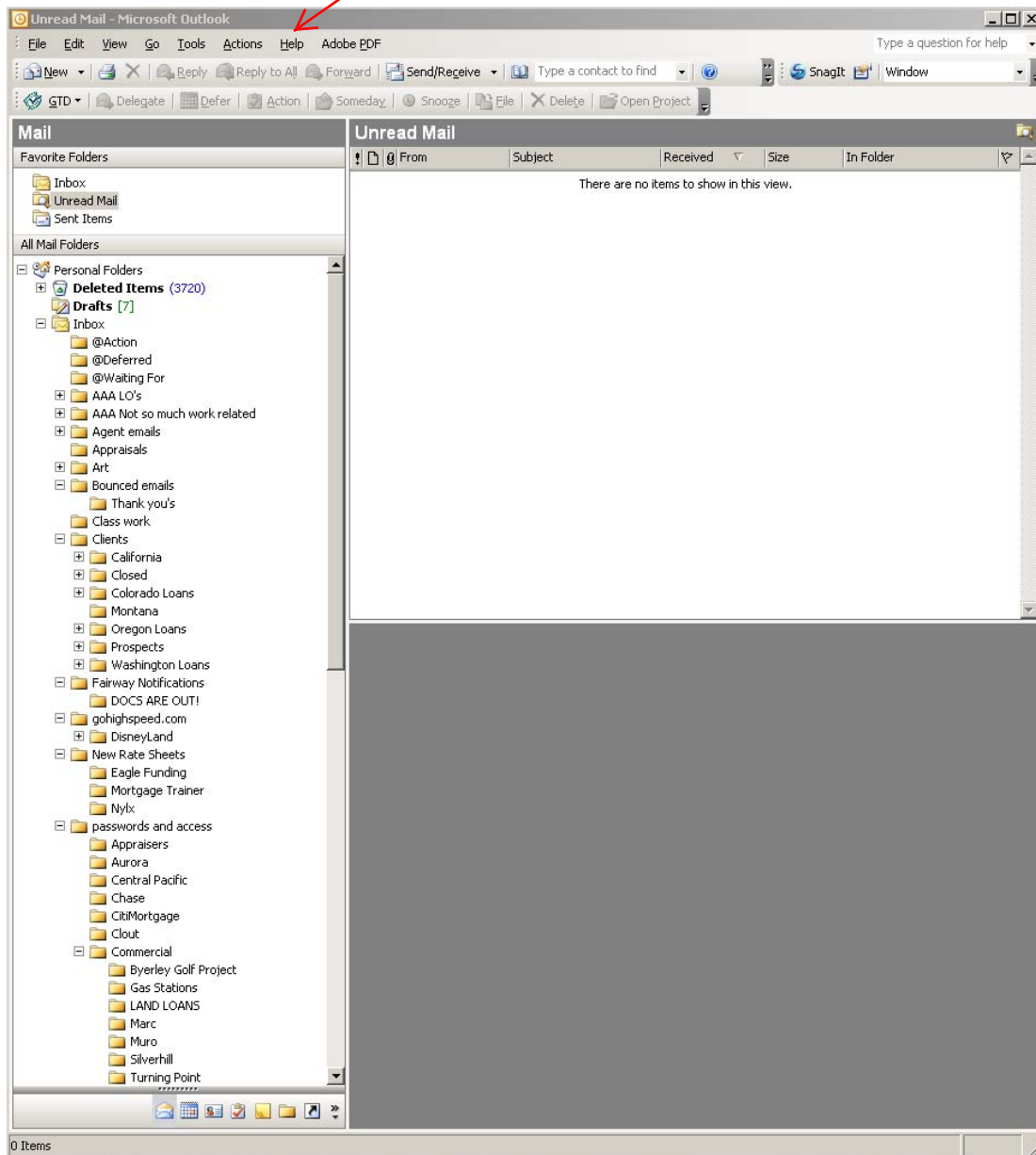


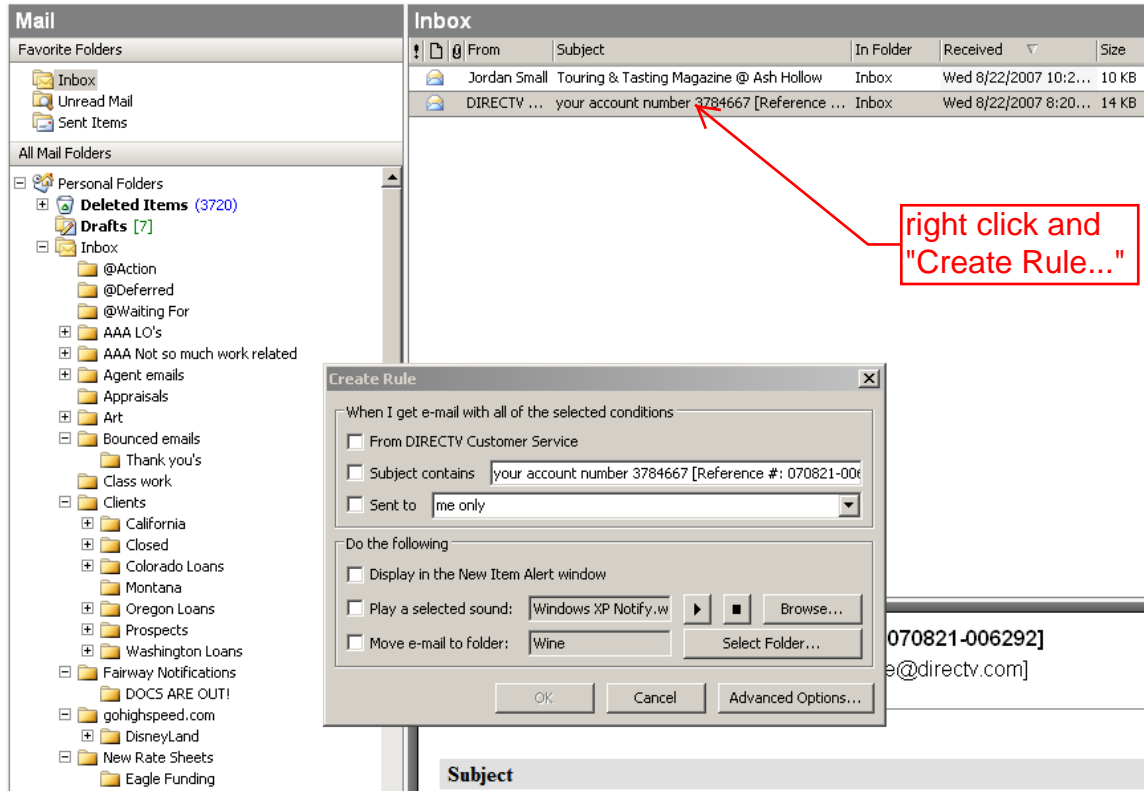
The purpose of this document is to show you a 5 minute step by step instruction that will filter 95% of all your email automatically. The below step by step instructions only take a few seconds once you are familiar with the process. Be patient, 5 minutes of your time now will save you 100 fold later.

Outlook Training assumes Outlook 2003 or later. You can check your version by clicking the Help menu then “about Microsoft Outlook” [Here](#)

This is an extended screenshot of my outlook email. Notice the numerous sub folders to the left. A number of these sub folders have a + that extends the folder to more sub folders.

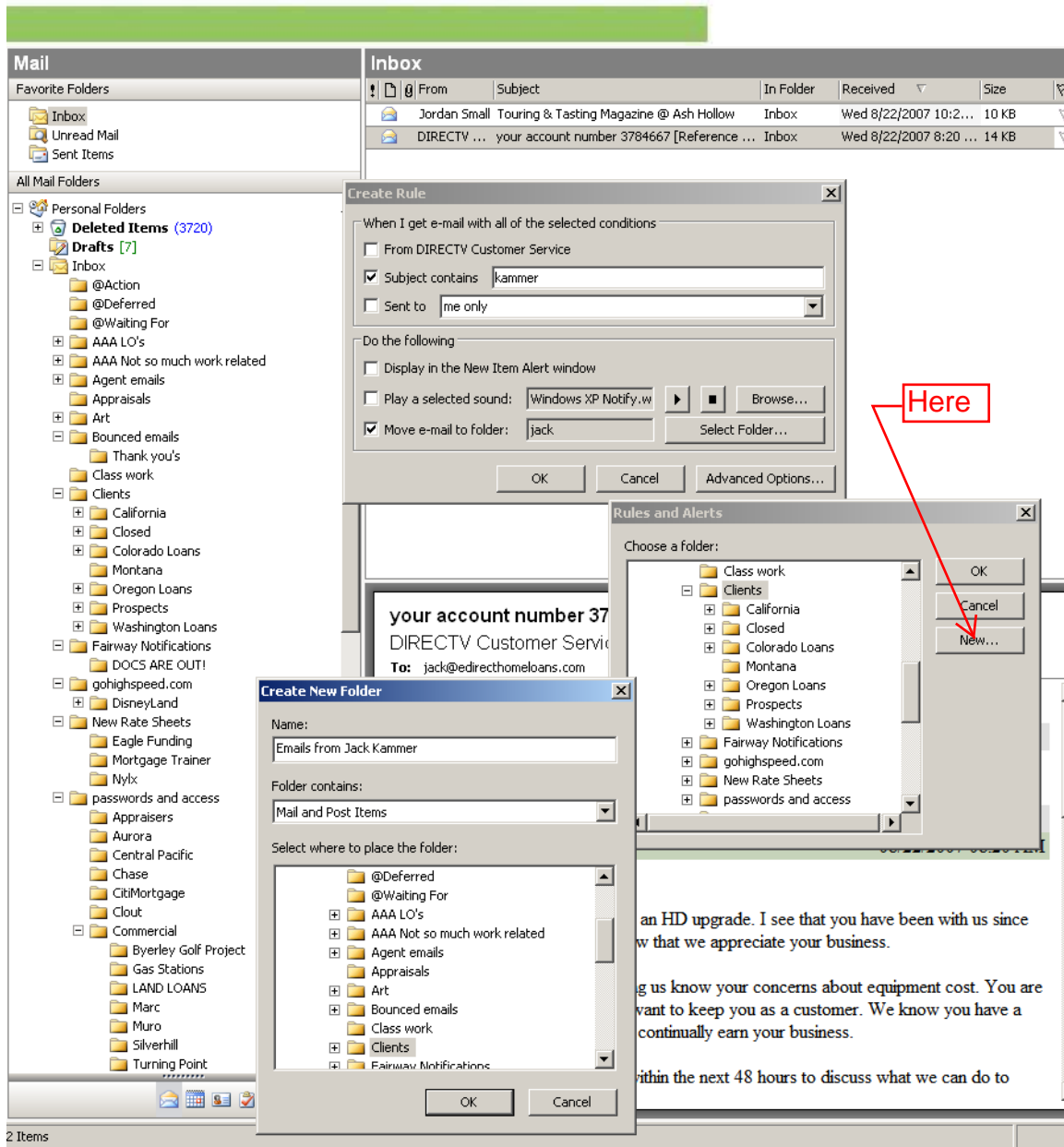


1. The first step is to go to your inbox and start creating rules for your emails. Highlight an email and right click. You will see midway down the menu “Create Rule”. Once you click on Create rule, you will see this screen shot.



At this point you have the option to have all emails from this person to go to a specific file, the subject line contains a specific word, or phrase. I personally like to use subject line with the client’s last name. That way all emails that contain the client’s last name in the subject line will go to their folder.

2. The below screen shot shows me creating a “New...” folder within the Clients folder (highlighted). I have now created a subfolder under Clients with the name “Emails from Jack Kammer”.



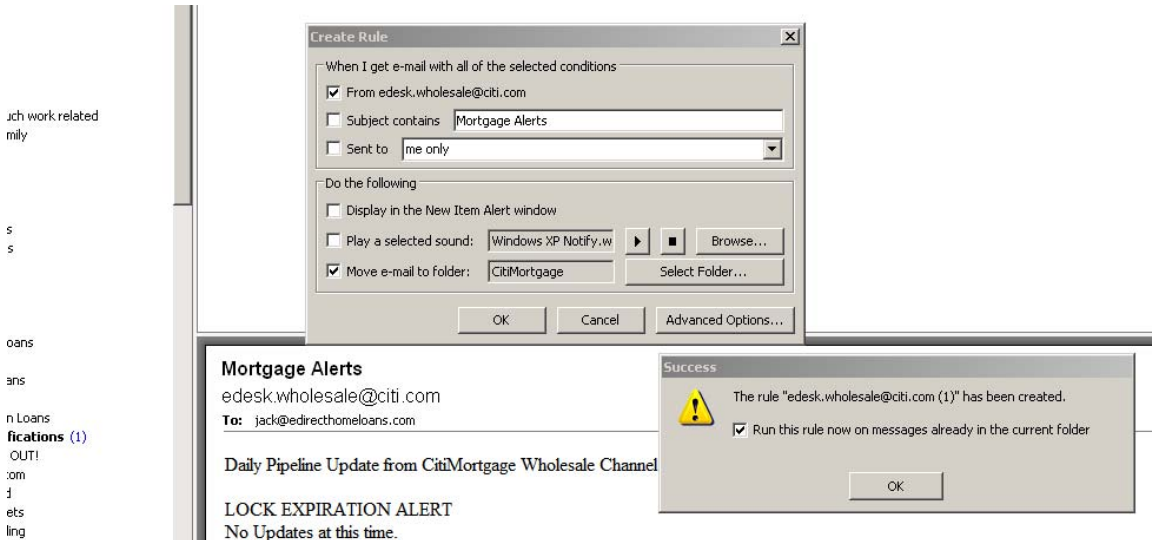
3. If you want to send all emails from a specific sender, look at the image below. I have clicked “New...” to create a sub folder, but this is only needed if a folder has not been created yet. Now all your emails from that client will go to that folder.

The screenshot displays the Outlook Mail interface with several windows open. The main window shows an email from 'edesk.wholesale...' with subject 'Mortgage Alerts' received on 'Wed 8/22/2007'. A red box highlights the text 'All emails from this sender will filter to the specified folder' with an arrow pointing to the 'From edesk.wholesale@citi.com' condition in the 'Create Rule' dialog. The 'Create Rule' dialog is configured with the following settings:

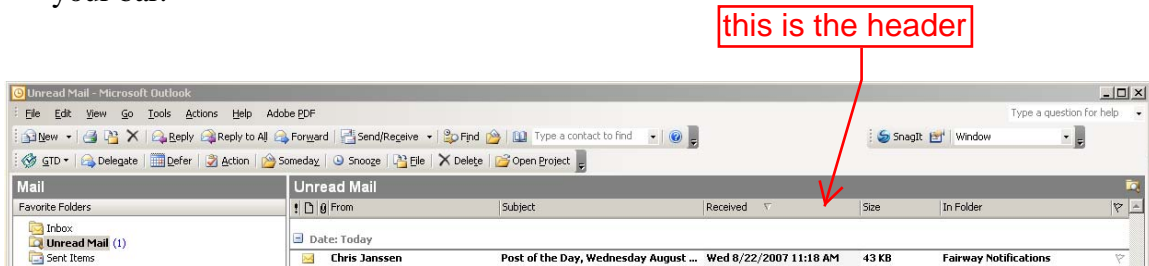
- When I get e-mail with all of the selected conditions:
 - From edesk.wholesale@citi.com
 - Subject contains Mortgage Alerts
 - Sent to me only
- Do the following:
 - Display in the New Item Alert window
 - Play a selected sound: Windows XP Notify.w
 - Move e-mail to folder:

The 'Move e-mail to folder' dialog shows a tree view of folders, with 'CitiMortgage (1)' selected. The 'Create New Folder' dialog is also open, showing the folder structure and the 'CitiMortgage (1)' folder selected.

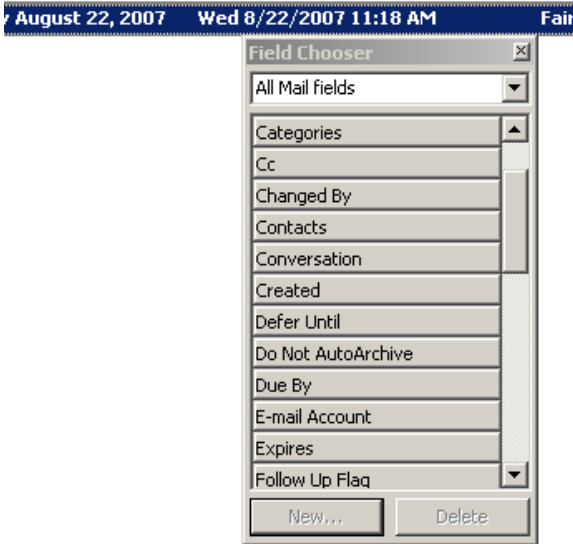
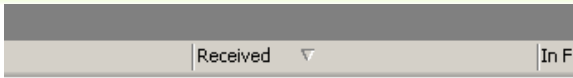
- Once you have decided on the specific filtering options you will see the below screen shot. Click “Run this rule now on messages already in the current folder”. The current folder is the inbox.



- The next step is to update your header that displays your email details. Notice under “Unread Mail” towards the very right you will see InFolder. You will need to add this to your bar.



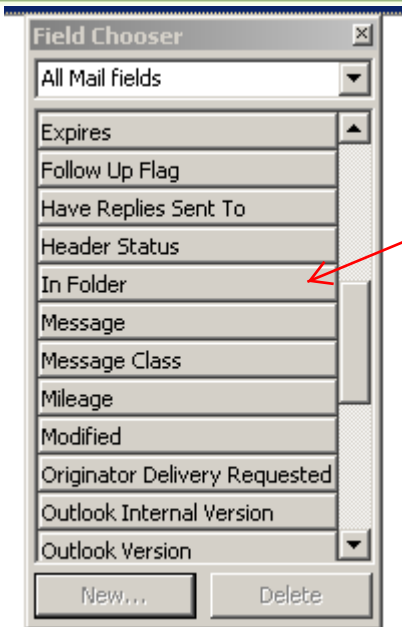
- Write click just under Unread Mail within the bar (From, Subject, Received...) in the middle of the menu will be “Field Chooser”. Click that and you will see the below screen shot.



Make sure that the pull down says “All Mail Fields” Below:



Within this field you will see In Folder.

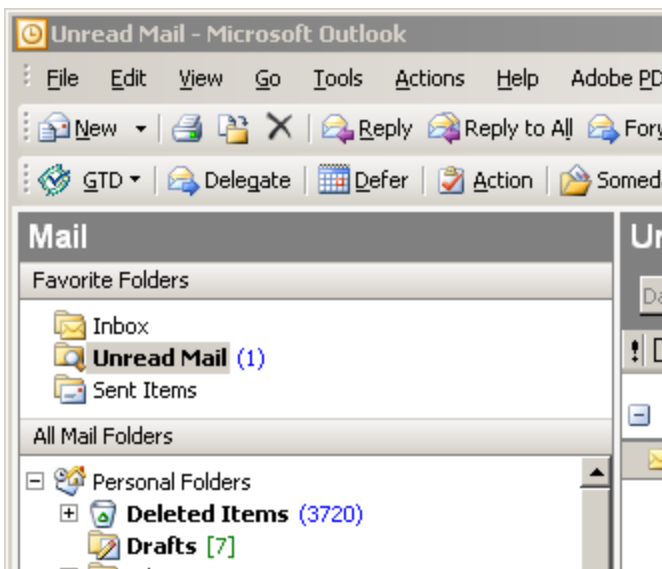


Left click and drag it between “Received” and “Size”.



The purpose of this exercise is to now see exactly where your emails are filtered.

You are now ready to only read you're “Unread Mail” from the “UnRead Mail” Folder.



Now within the Unread Mail folder we see exactly which folders those emails are sitting.

Received ▼ In Folder

Mon 8/20/2007 11... Fairway Notificati

Mon 8/20/2007 9:... CitiMortgage

Fri 8/10/2007 5:49... IndiMac

Wed 7/18/2007 3:... Commercial

You will notice that as you create the rules, your inbox will dramatically shrink. You may have 2000 emails in the inbox but only 100 rules. Every time you have a new email that is not associated with a folder, decide if it warrants a rule or not.