How to Control Your Inbox – Use Rules

By Robyn Pearce

As I work with people around the world on their productivity issues, everyone shares one common challenge – too much time spent on email.

One really simple strategy can make a huge difference, and yet hardly anyone uses it. When correctly set up, Rules save you filing time, make it far easier to keep your Inbox under control and simplify finding things. (If you use something other than Outlook, check your Help menu for specifics. Sorry, but this explanation is for Outlook users.)

Many people know vaguely that Rules are useful. Some know that they can be created to assist in automatic filing of much of our mail. But even those who do know, often don't follow through for fear that they'll lose sight of new mail. (I was just the same for years!) In fact you won't lose anything – as long as you change one tiny action when you first go to your Inbox.

How to create a Rule:
Choose an email in your Inbox that you'd like to file. Right-click on it. A menu will open up. Choose 'Create Rule'. (There are other ways to create Rules but I like the ease of this method.)

In the 'Create Rule' dialogue box that opens you'll see the email address of the sender in the top box. If you want to save all correspondence from that person to only one folder, tick the top box. (How to manage a person who covers multiple topics is explained below.)

The two panels at the bottom of the dialogue box are the key to it all. Tick 'Move email to folder' and then 'Select Folder'. This will open up your entire list of folders, if you've got some. Highlight your chosen folder and click OK.

Now you've got a simple rule.

How to set up folders whilst working in Rules:
If you don't yet have folders for different topics, don't worry. You can create them as you go. Essentially you're setting up a filing cabinet, only this one is electronic.

Even though Outlook now has a really good search function, it isn't 100% reliable. Sometimes something really important eludes you. If you use folders for the important communications you need to refer back to you'll have more peace of mind.

(Tip when creating a new folder – check carefully where it will sit. It will default to below whatever folder was highlighted in the dialogue box unless you choose differently. Some people file everything under Inbox; I go higher and file under Personal Folders.)

The cool and sophisticated part!
'Advanced Options' covers all the variables. Take a tour through all the screens and prepare to be delighted. The Wizard will walk you through a bunch of additions, inclusions and exceptions.

For instance, suppose you want everything with the word 'Media' in either the subject line or in the body of the text, and which comes from your PR firm, to go to a Media folder. In the first page of the

Advanced Options Wizard you'd tick both 'with specific words in the body' and 'with specific words in the message header'. In the Edit box below, click on both sets of 'specific words' (this will show up once you've ticked as directed in the top panel). Now you can add any words you like.

You'll almost certainly have a few people who send mail on multiple topics. Suppose you want most of the mail from your Administration Manager Bill in one folder but travel bookings he organises for you in a separate Travel folder. Use the 'exception' facility. (And ask him to put the word 'Travel' or 'Bookings' in his subject line.) The description will then look something like this:

> **Apply this rule after the message arrives**
> from Bill
> move it to the Office folder
> except if the subject or body contains Travel or Bookings

How can I keep track of new mail if it's automatically filed?:
Now, here's the tiny behaviour change which solves the problem of possibly missing new items.

Instead of going to Inbox when you check new mail, go first to 'Unread Mail'. Then it doesn't matter in which folder your mail has automatically filed itself. Everything unread shows up in this folder, patiently waiting your attention.

If you've not activated it you'll find it (shown in italics) under Search Folders, usually near the bottom of your entire list of Mail Folders. The first time you click on 'Unread Mail' it will populate with any unread mail, no matter where it's sitting in your email system. (What you see in 'Unread Mail' is a replica – the mail doesn't move.) Now click and drag the 'Unread Mail' folder up to the top left Favourite Folders panel. Whilst you're there, do the same with 'For Follow Up' – it's another really useful folder we'll talk about in a minute.

How to keep track of future actions:
Once you've opened a mail, if you go out of the 'Unread Mail' folder, naturally the mail will disappear. If you haven't finished with it you have at least four simple options.

- Right click and choose 'Follow Up'. You'll get a selection of flags. It will still disappear from 'Unread Mail' but will remain in the 'Follow Up' folder.
- A right click will also give you the choice to 'Mark as Unread'. Very useful if you like to use the 'Unread' folder as a form of 'to do' list.
- If it's an appointment or big task you need to block time out for, click and drag the email into an appointment in your Calendar. It will also stay in whichever email folder it's filed in.
- If you use the Task function in Outlook (which not many people do – it's too hard to prioritise effectively) you can also click and drag the entire email into Tasks

A couple of cautions if you read your mail on a smartphone – there are some limitations
I find on my iPhone that the mail that has auto-filed into folders doesn't show when you go to the Mail icon on the home screen of your phone. If you're expecting something and don't see it, a double check is to hit the 'Back' button on the top left of the mail screen, then choose the relevant Account at the lower part of the screen. You'll then see your entire hierarchy of folders and you'll see numbers beside the folders with new unopened content.

When I'm travelling or going to be with clients all day I often do a quick check of email on my phone fairly early in the day. A quick trick to make sure you don't lose sight of a future action for when you're at your desk is to turn the read mail back to Unread.

Have fun saving time.

Of course you still have to deal with the mail, but many users save themselves easily up to half an hour a day.

Have fun with that Rule creation and easy filing!