Affinity
INSIGHT

MICROSOFT OUTLOOK for LEGAL PROFESSIONALS

Covering Outlook for Windows Versions 2010, 2013, 2016, 2019 and Microsoft 365

MICROSOFT OUTLOOK

FOR LEGAL PROFESSIONALS

PERSONAL LICENSE

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Mac users: If you are using this manual with Outlook for Mac, some of the steps will be different. Further, some features available in Outlook for Windows are not available in Outlook for Mac.

The materials in this book were written using Microsoft 365 and all steps and instructions were tested prior to the publication date. As Microsoft continuously updates Microsoft 365, your software experience may vary slightly from what is seen in this manual.

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Version 3.04

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MEET OUR TEAM OF OUTLOOK EXPERTS

Meet our team of Outlook experts who have co-authored this manual.

BARRON HENLEY

Most people wouldn’t relish the idea of spending a day in a conference room, teaching Microsoft Outlook. Barron is not most people. There are few things Barron enjoys more than teaching all-day software training classes.

As an attorney, he understands how challenging it is to practice law without the proper training on the technology tools. When Barron isn't training people on Word or helping transition organizations transition from WordPerfect, he focuses on automating documents and teaching CLE classes for attorneys across North America.

PAUL UNGER

While most people understand the day-to-day struggle of keeping up with email, Paul knows how to tackle the problem better than anyone. Paul's passion is coaching lawyers on managing time, distractions, tasks, emails, and documents efficiently. As the author of Tame the Digital Chaos – A Lawyer’s Guide to Time, Task, Email and Distraction Management, Paul is truly an expert on the topic.

Paul's expertise is well-founded from his time practicing law. When Paul isn't coaching lawyers, he teaches CLE classes for attorneys across North America.

DANIELLE DAVISROE

Passionate about remote learning, Danielle is the force behind Affinity's membership training program, Affinity Insight. Danielle focuses on creating easily accessible training materials and webinars tailored to meet each organization's needs. From one-on-one training to organization-wide training plans, Danielle has her clients covered.

When Danielle isn't providing remote training, she focuses on teaching CLE via webinar and providing legal organizations with the advice they need to run smoothly. With a background practicing law at a boutique firm, Danielle understands the challenges that legal professionals face every day.

MICROSOFT OUTLOOK FOR LEGAL PROFESSIONALS
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EMAIL: RULES

Can't find it? Something missing? Instructions not clear? Email manuals@affinityconsulting.com.

Rules automatically take actions when certain conditions are met. For example, rules can be used to auto-file incoming email into specific folders. Rules are very powerful and can save you a lot of time. However, because they happen automatically, you need to be careful about creating rules that make it so you may miss incoming emails.

RULE PARTS

Rules have 3 parts:

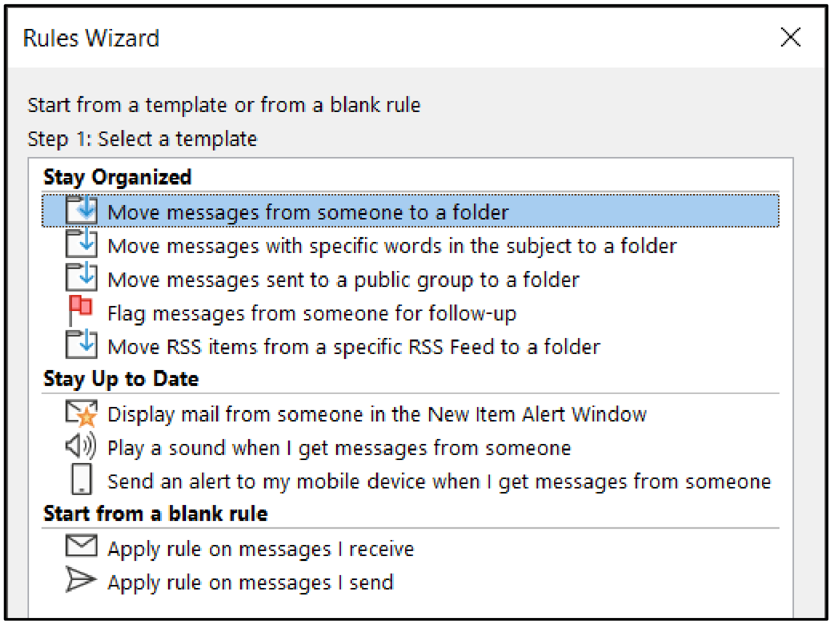
- **Condition** (Optional): Use conditions to determine when to the apply the rule. If no conditions are set, the rule is applied to every incoming email. Conditions include things like emails from particular senders, with particular subjects, sent only to you, and with specific words in the email. If no conditions are set, the rule will be applied to every incoming email.
- **Actions**: The action is what happens when the condition is met. Actions include things like moving to a specified folder, categorizing the email, deleing the email, forwarding the email, and flagging the email.
- **Exceptions** (Optional): Exceptions to the conditions prevent the rule from being applied to certain emails. Exceptions include things like emails from particular senders, with particular subjects, sent only to you, and with specific words in the email.

RULES WIZARD

The Rules Wizard walks you through creating simple rules based on templates.

1. On the **Home ribbon**, click on the **Rules button** and select **Manage Rules & Alerts**.
2. Click on the **New Rule** button.

3. Select the desired template and click on the **Next > button**.



Rules Wizard

Start from a template or from a blank rule

Step 1: Select a template

Stay Organized

- Move messages from someone to a folder
- Move messages with specific words in the subject to a folder
- Move messages sent to a public group to a folder
- Flag messages from someone for follow-up
- Move RSS items from a specific RSS Feed to a folder

Stay Up to Date

- Display mail from someone in the New Item Alert Window
- Play a sound when I get messages from someone
- Send an alert to my mobile device when I get messages from someone

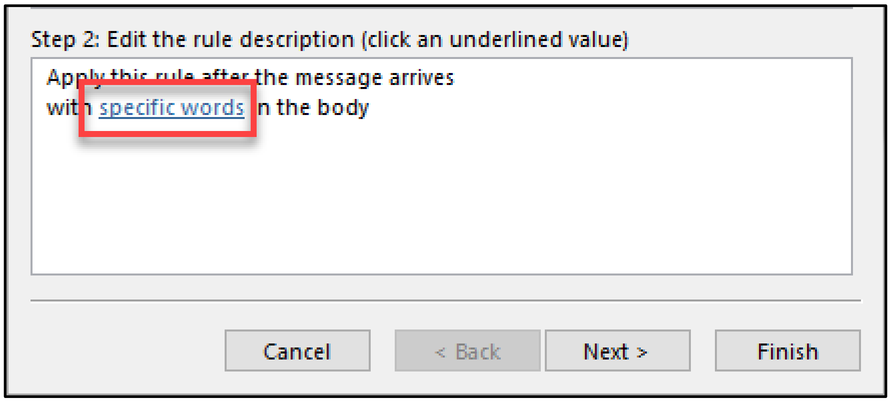
Start from a blank rule

- Apply rule on messages I receive
- Apply rule on messages I send

FIGURE 6-1

4. Under **Step 1**, check the boxes to add additional conditions, if any.

5. Words in blue are variables that you can change. Under **Step 2**, click on the variables to change them.



Step 2: Edit the rule description (click an underlined value)

Apply this rule after the message arrives
with specific words in the body

FIGURE 6-2

6. Click on the **Next > button**.

7. Under **Step 1**, check the box(es) next any additional action(s), if any.

8. Words in blue are variables that you can change. Under **Step 2**, click on the variables to change them.

9. Click on the **Next > button**.

10. Under **Step 1**, check the box(es) next the desired exception(s), if any.

11. Words in blue are variables that you can change.Under **Step 2**, click on the variables to change them.

12. Click on the **Next > button**.

13. Name the rule.
14. Optionally, to apply the rule to all emails in your inbox, under **Step 2**, check the box for **Run this rule now on messages already in "inbox."**
15. Click **Finish**.

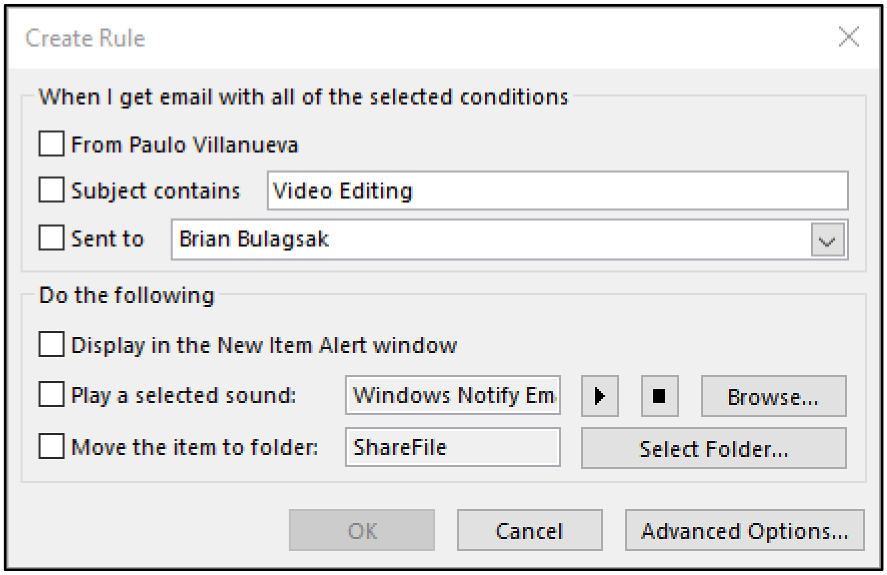
CREATE RULES FROM EXISTING EMAILS

You can also create rules from existing emails. Doing so pre-populates many of the fields for you.

Simple Rules

The simplest rules to create use sender, subject, and/or recipient as the condition and move the email into a specified folder or create an alert as the action.

1. Find an email that meets your conditions.
2. Right-click on the email and select **Rules** ➔ **Create Rule…**
3. The Create Rule dialog will pre-populate with information from the email, including the sender, the subject, and the recipients. Check the box next to the desired condition(s).
4. Check the box next the desired action(s).
5. Click **OK.**



Create Rule

When I get email with all of the selected conditions

☐ From Paulo Villanueva

☐ Subject contains: Video Editing

☐ Sent to: Brian Bulagsak

Do the following

☐ Display in the New Item Alert window

☐ Play a selected sound: Windows Notify Em

☐ Move the item to folder: ShareFile

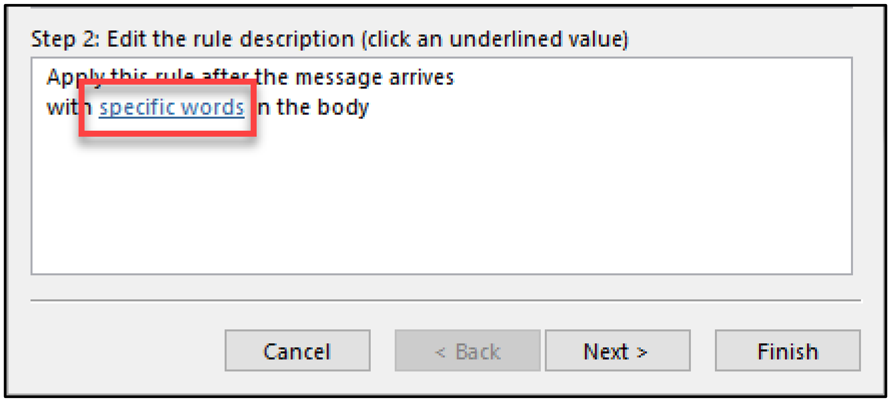
FIGURE 6-3

More Complex Rules

You can create more complex rules from existing emails, you just need to use the advanced options.

6. Find an email that meets your conditions.
7. Right-click on the email and select **Rules** ➔ **Create Rule…**
8. Click on the **Advanced Options… button**.
9. Under **Step 1**, check the box(es) next the desired condition(s).

10. Words in blue are variables that you can change. Some of these variables will be pre-populated from the email you selected. Under **Step 2**, click on the variables to change them.



Step 2: Edit the rule description (click an underlined value)

Apply this rule after the message arrives
with specific words in the body

FIGURE 6-4

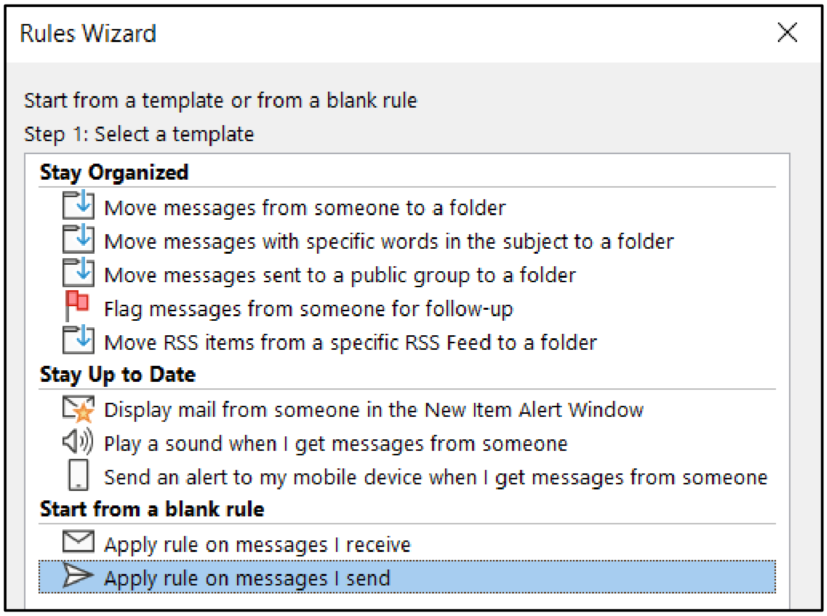
11. Click on the **Next > button**.
12. Under **Step 1**, check the box(es) next the desired action(s).
13. Words in blue are variables that you can change. Some of these variables will be pre-populated from the email you selected. Under **Step 2**, click on the variables to change them.
14. Click on the **Next > button**.
15. Under **Step 1**, check the box(es) next the desired exception(s), if any.
16. Words in blue are variables that you can change. Some of these variables will be pre-populated from the email you selected. Under **Step 2**, click on the variables to change them.
17. Click on the **Next > button**.
18. Name the rule.
19. Optionally, to apply the rule to all emails in your inbox, under **Step 2**, check the box for **Run this rule now on messages already in "inbox."**
20. Click **Finish**.

EXAMPLE RULES

Delay Send Email by One Minute

Instructions to set up a rule to delay sending mail by one minute (in case you change your mind):

1. On the **Home ribbon**, click on the **Rules button** and select **Manage Rules & Alerts**.
2. Click the **New Rule** button.
3. Select **Apply rule on messages I send** and click **Next**.



Rules Wizard

Start from a template or from a blank rule

Step 1: Select a template

Stay Organized

- Move messages from someone to a folder
- Move messages with specific words in the subject to a folder
- Move messages sent to a public group to a folder
- Flag messages from someone for follow-up
- Move RSS items from a specific RSS Feed to a folder

Stay Up to Date

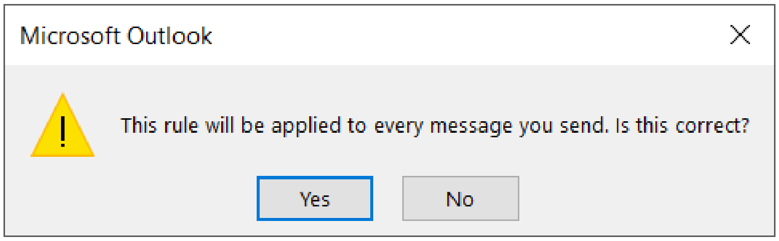
- Display mail from someone in the New Item Alert Window
- Play a sound when I get messages from someone
- Send an alert to my mobile device when I get messages from someone

Start from a blank rule

- Apply rule on messages I receive
- Apply rule on messages I send

FIGURE 6-5

4. On the next screen ("which conditions do you want to check"), don't check anything (you want this rule to apply to every email you send) and click the **Next** button at the bottom. You'll see the following dialog (click **Yes**):

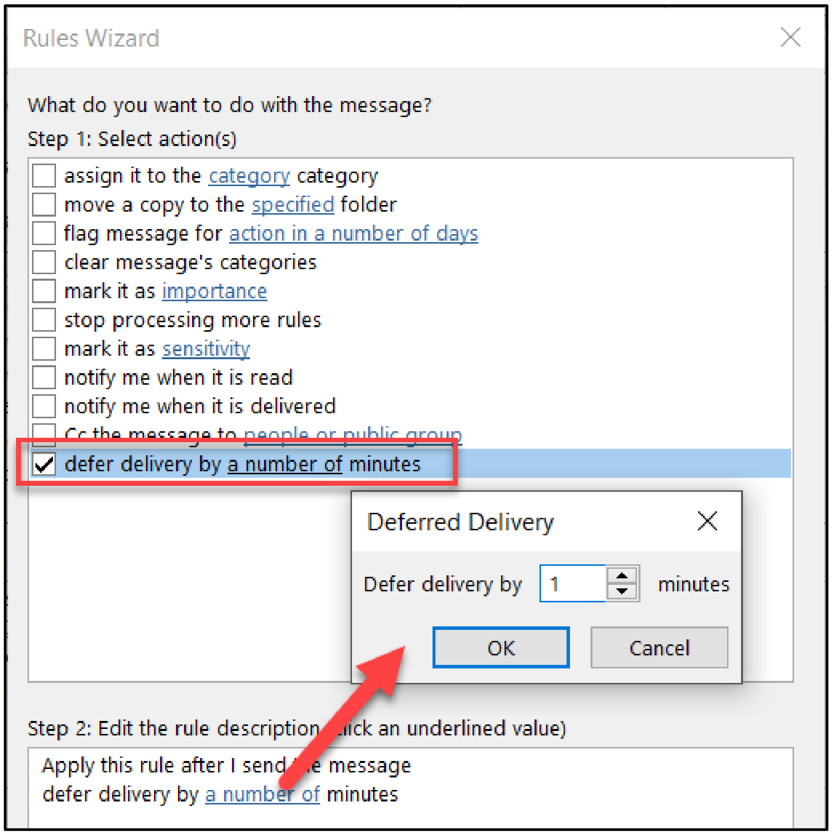


Microsoft Outlook

This rule will be applied to every message you send. Is this correct?

FIGURE 6-6

5. In the next screen, check **defer delivery by a number of minutes**, and then click the hyperlink for **a number of** at the bottom of the screen and enter the number of minutes you want to delay your email. Click **OK**.



Rules Wizard

What do you want to do with the message?

Step 1: Select action(s)

☐ assign it to the category category
☐ move a copy to the specified folder
☐ flag message for action in a number of days
☐ clear message's categories
☐ mark it as importance
☐ stop processing more rules
☐ mark it as sensitivity
☐ notify me when it is read
☐ notify me when it is delivered
☐ Cc the message to people or public group
☑ defer delivery by a number of minutes

Deferred Delivery

Defer delivery by 1 minutes

Step 2: Edit the rule description lick an underlined value)

Apply this rule after I send e message
defer delivery by a number of minutes

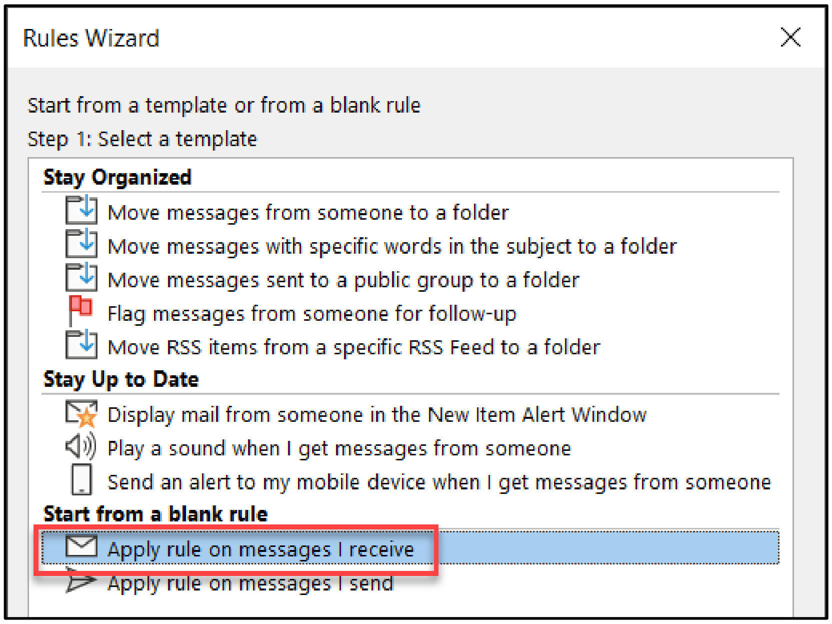
FIGURE 6-7

6. Click **Next** and add any exceptions (for people you don't want to delay email to).
7. Click **Next**, name your rule "Delay" (or anything else you want to name it) and click **Finish**.

Keep Track of Delegated Email

Many people forward email to others to deal with but have a difficult time remembering what they delegated for follow up purposes. Here's a rule that will help.

1. On the **Home ribbon**, click on the **Rules button** and select **Manage Rules & Alerts**.
2. Click the **New Rule** button.
3. Select **Apply rule on messages I receive** and click **Next**.


Rules Wizard

Start from a template or from a blank rule

Step 1: Select a template

Stay Organized

- Move messages from someone to a folder
- Move messages with specific words in the subject to a folder
- Move messages sent to a public group to a folder
- Flag messages from someone for follow-up
- Move RSS items from a specific RSS Feed to a folder

Stay Up to Date

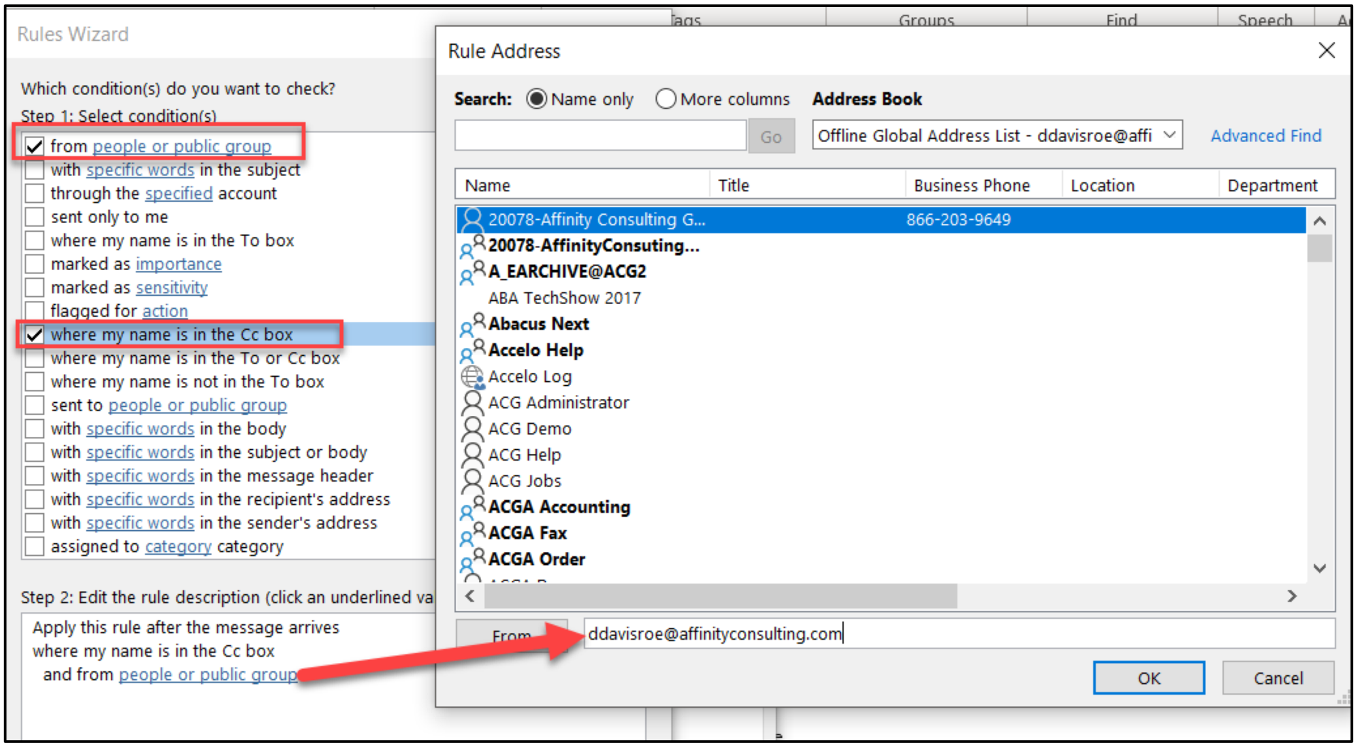
- Display mail from someone in the New Item Alert Window
- Play a sound when I get messages from someone
- Send an alert to my mobile device when I get messages from someone

Start from a blank rule

- Apply rule on messages I receive
- Apply rule on messages I send

FIGURE 6-8

4. Under "Which conditions do you want to check?," check BOTH **from people or public group** and **where my name is in the CC box**. At the bottom of the dialog, click the hyperlink for **people or public group** and add your email address. We're basically creating a rule that will look for emails from you and copied to you. Click **Next**.


Rules Wizard

Which condition(s) do you want to check?

Step 1: Select condition(s)

☑ from people or public group
☐ with specific words in the subject
☐ through the specified account
☐ sent only to me
☐ where my name is in the To box
☐ marked as importance
☐ marked as sensitivity
☐ flagged for action
☑ where my name is in the Cc box
☐ where my name is in the To or Cc box
☐ where my name is not in the To box
☐ sent to people or public group
☐ with specific words in the body
☐ with specific words in the subject or body
☐ with specific words in the message header
☐ with specific words in the recipient's address
☐ with specific words in the sender's address
☐ assigned to category category

Step 2: Edit the rule description (click an underlined va

Apply this rule after the message arrives
where my name is in the Cc box
and from people or public group

Rule Address

Search: ● Name only ○ More columns **Address Book**

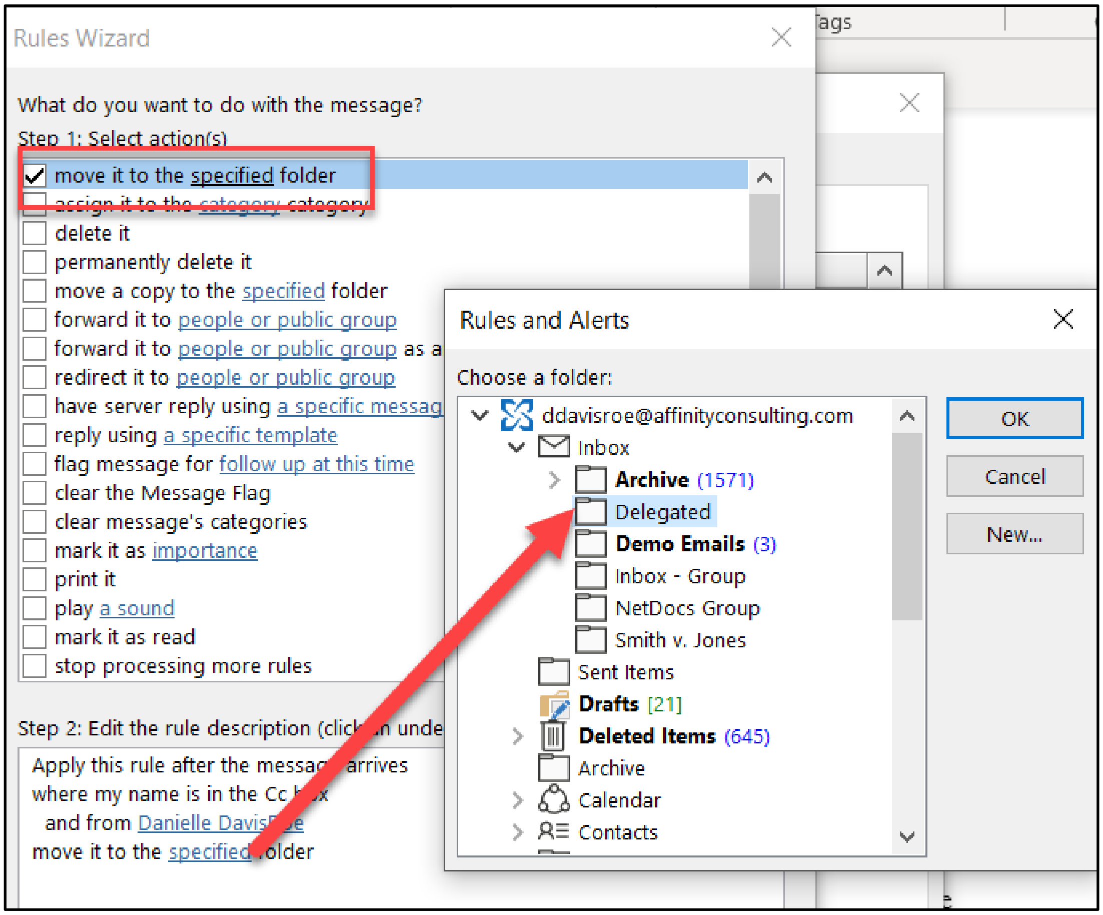
Offline Global Address List - ddavisroe@affi

Name	Title	Business Phone	Location	Department
20078-Affinity Consulting G...		866-203-9649		
20078-AffinityConsuting...				
A_EARCHIVE@ACG2				
ABA TechShow 2017				
Abacus Next				
Accelo Help				
Accelo Log				
ACG Administrator				
ACG Demo				
ACG Help				
ACG Jobs				
ACGA Accounting				
ACGA Fax				
ACGA Order				

From -> ddavisroe@affinityconsulting.com

FIGURE 6-9

5. Under "What do you want to do with the message?" choose **move it to the specified folder**. Make the specified folder your Delegated Mail folder. Click **Next** and add any exceptions. Click **Next**, name it and click **Finish**.



Rules Wizard

What do you want to do with the message?

Step 1: Select action(s)

- ☑ move it to the specified folder
- ☐ assign it to the category category
- ☐ delete it
- ☐ permanently delete it
- ☐ move a copy to the specified folder
- ☐ forward it to people or public group
- ☐ forward it to people or public group as a
- ☐ redirect it to people or public group
- ☐ have server reply using a specific messag
- ☐ reply using a specific template
- ☐ flag message for follow up at this time
- ☐ clear the Message Flag
- ☐ clear message's categories
- ☐ mark it as importance
- ☐ print it
- ☐ play a sound
- ☐ mark it as read
- ☐ stop processing more rules

Step 2: Edit the rule description (click an unde

Apply this rule after the message arrives
where my name is in the Cc box
and from Danielle Davisroe
move it to the specified folder

Rules and Alerts

Choose a folder:

ddavisroe@affinityconsulting.com
Inbox
Archive (1571)
Delegated
Demo Emails (3)
Inbox - Group
NetDocs Group
Smith v. Jones
Sent Items
Drafts [21]
Deleted Items (645)
Archive
Calendar
Contacts
OK
Cancel
New...
ags

FIGURE 6-10

MANAGE RULES

Turn Off Rules

Turn rules off by un-checking them in the Rules and Alerts dialog.

1. On the **Home ribbon**, click on the **Rules button** and select **Manage Rules & Alerts**.
2. Uncheck the boxes next to any rules you want to turn off.

Reorder Rules

Rules are processed in the order in which they are listed in the Rules and Alerts dialog. The order may make a difference if more than one rule applies to an incoming email.

1. On the **Home ribbon**, click on the **Rules button** and select **Manage Rules & Alerts**.
2. Use the up and down arrows to reorder the rules.

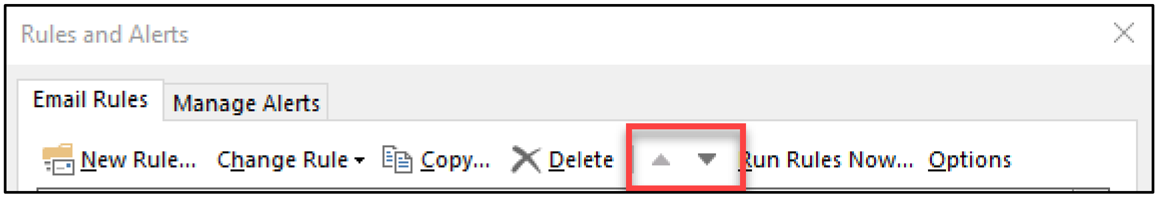

Rules and Alerts
Email Rules
Manage Alerts
New Rule...
Change Rule
Copy...
Delete
Run Rules Now...
Options

FIGURE 6-11

Stop Processing Rules

Sometimes, when a condition is met and a rule is applied, you want to stop processing other rules. Stop processing rules is an action that can be added to any rule. See below for instructions on how to edit any existing rules.

Edit Existing Rules

You can edit any existing rules through the Rules and Alerts dialog.

1. On the **Home ribbon**, click on the **Rules button** and select **Manage Rules & Alerts**.
2. Click on **Change Rule**.
3. Select **Edit Rule Settings…**

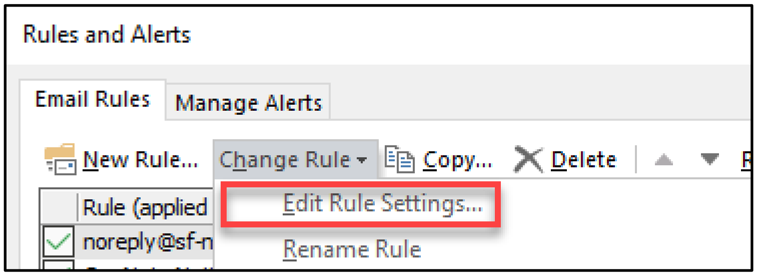

Rules and Alerts
Email Rules
Manage Alerts
New Rule...
Change Rule
Copy...
Delete
Rule (applied
noreply@sf-n
Edit Rule Settings...
Rename Rule

FIGURE 6-12

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TRAINING

Affinity
INSIGHT

- On-demand training videos
- Software manuals
- Training webinars
- Custom training plans
- On-boarding plans
- Quarterly training reviews

TRAINING

Are you getting the most out of your technology investment? Turn your team into software experts and experience unprecedented gains in productivity and efficiency.

At Affinity, we believe that training should be woven into the fabric of a firm's culture—not a one-time event. Our team understands that implementing the right technology is only the first step toward an optimized practice. Realizing your firm's full potential requires an ongoing investment in training.

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