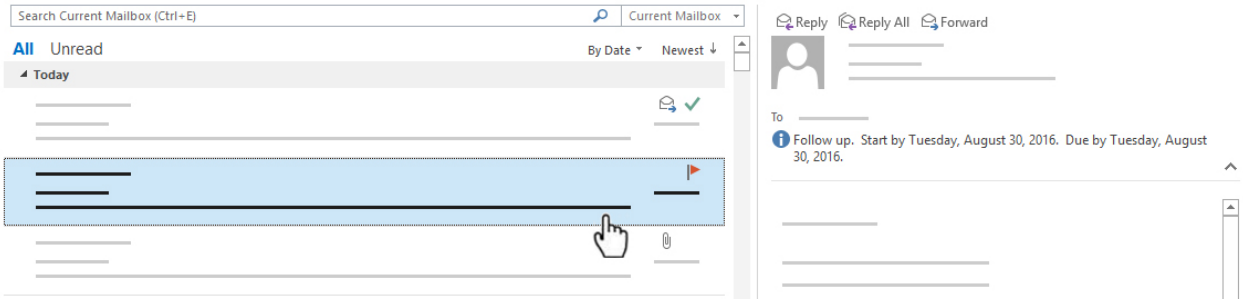
Outlook - Categorize Items

Set categories, flags, reminders

Set a Follow Up flag

1. Select the email message.
2. Select the .

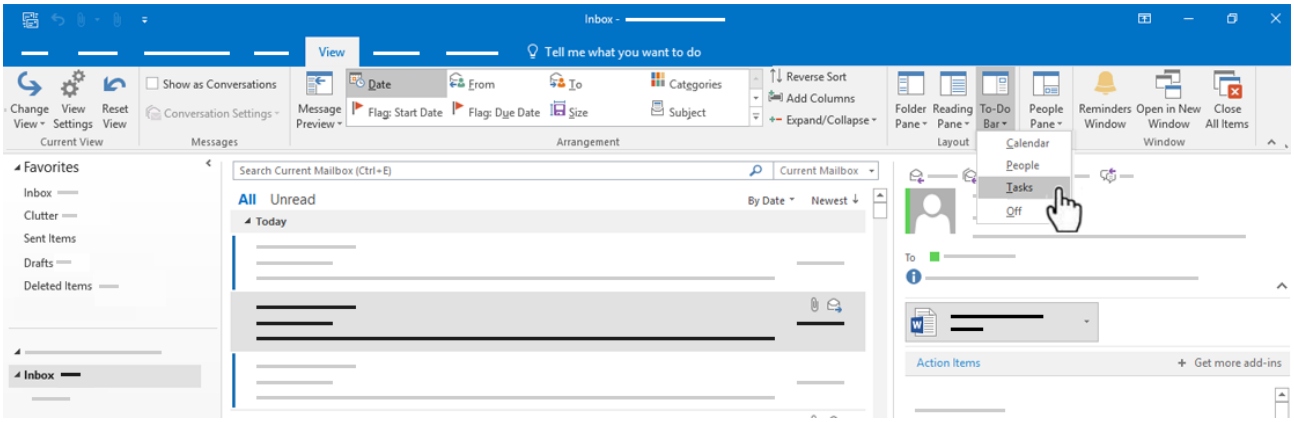
   The flag turns red and a **Follow up** message appears in the header of the email message.



Note: Follow Up flags are used for actionable items only.

View all Follow Up Flags

1. Select **View** >**To-Do Bar** >**Tasks**.



2. The **To-Do Bar** pane opens and shows all flags.

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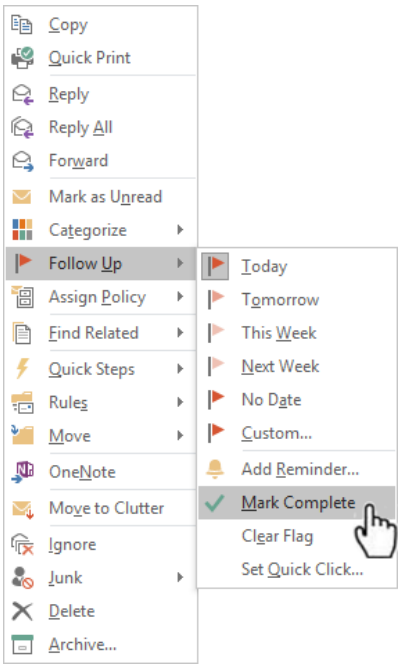
Remove a Follow Up Flag

1. Right-click the email message.
2. Select **Follow Up** > **Mark Complete**.



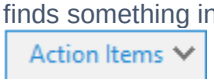
The **Follow Up** Flag changes to a green checkmark and is removed from the **To-Do Bar**.

Set a Reminder

1. Select the email message for which you want to set the reminder.
2. Select **Home** >**Follow Up** > **Add Reminder**.
3. In the **Custom** box, for **Flag to,** select **Follow up** or type a description.
4. Check the **Reminder** box, enter date and time, and then select **OK**.

   An alarm bell icon will appear on the message.
5. To change the time for the reminder, select **Follow Up**, select **Add Reminder**, edit the time, and then select **OK**.

Find an Action Item

1. If Outlook finds something in an email that looks like an action item, an **Action items** tab 

automatically appears on the reading pane.
2. Select the **Action Items** drop-down arrow to read the action item, and then select **FOLLOW UP** if you'd like to set a **Follow Up Flag** to remind you to do that action item.
   Note: If you select **FOLLOW UP**, the action item displays in the **To-Do Bar** pane.
3. When the task is done, mark it complete.
   - From the **Action Items** drop-down, select **Mark Complete**, or
   - In the **To-Do Bar** pane, right-click the flagged message and select **Mark Complete**.

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Organize emails by using folders

Create folders to organize emails, move messages, and add folders to your Favorites folder for easy access.

Create a folder

1. Right-click **Inbox** and select **New Folder.**
2. Type a name for the folder and press Enter.

Move messages into a folder

1. Select an email message.
2. Drag and drop it into a folder.

   Note: To move more than one email, select an email, hold down the Shift key and select other messages, and then click, drag, and drop them into a folder.

Add a folder to Favorites

- To add a folder to **Favorites**, right-click the folder, and then select **Show in Favorites**.

  Note: You can also select the folder, and then drag and drop it in **Favorites**.

Click to watch the “Organize emails by using folders” video.

How to set up rules

Create a rule on a message

1. Right-click a message and select **Rules** > **Create Rule**.
2. Select a condition, and what to do with the message based on the condition.

   For example, to move messages with a certain title to a specific folder, select the **Subject contains** condition, select **Move the item to folder**, select or create a **New** folder, and then select **OK**.
3. When you're done creating the rule, select **OK.**
4. To use the rule right away, select the **Run this new rule now on messages already in the current folder** checkbox, and then select **OK**.

The message now appears in that folder.

Create a rule from a template

1. Select **File** > **Manage Rules & Alerts** > **New Rule**.
2. Select a template.

   For example, to flag a message:

   - Select **Flag messages from someone for follow-up**.
3. Edit the rule description.

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- Click an underlined value, choose the options you want, and then select **OK**.

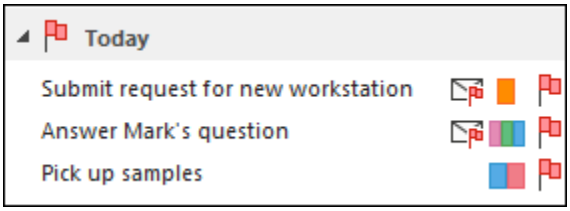
4. Select **Next**.
5. Select the conditions, add the relevant information, and then select **OK**.
6. Select **Next**.
7. Finish the rule setup.
   - Name the rule, setup rule options, and review the rule description. Click an underlined value to edit.
8. Select **Finish**.

   Certain rules will only run when Outlook is on. If you get this warning, select **OK**.
9. Select **OK**.

Click to watch the "How to set up rules" video.

Create and assign color categories

Color categories allow you to easily identify and group associated items in Microsoft Outlook. Assign a color category to a group of interrelated items—such as notes, contacts, appointments, and email messages—so that you can quickly track and organize them. You can also assign more than one color category to items.



You can choose from a set of default categories or create your own, and then assign the categories to your Outlook items. The category colors are displayed in table views, such as your Inbox, and within the open items themselves. You can rename the categories to something more meaningful to you or choose different colors for the categories. This flexibility enables you to design a color category system that fits your personal work style.

Note: If you are using Outlook with an IMAP account, you cannot assign categories to an item. The IMAP email account type does not support categories.

Assign a color category to an email message

To assign a color category to a message from the message list, right-click the message. Select **Categorize**, then select a category from the list.

Tip: If you right-click the message and you only see options to flag the message, try right-clicking in the blank space to the right of the sender's name.

Note: If you want to assign a second or third color category, you can perform this action multiple times.

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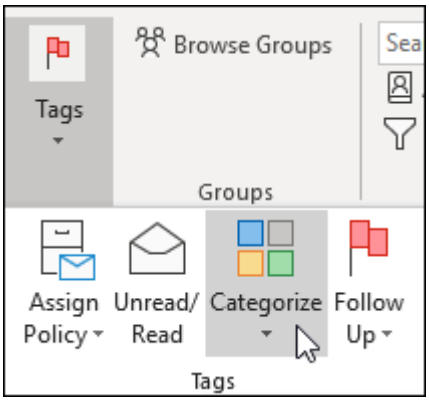
To assign a color category from the reading pane or an open message, select **Categorize** from the **Tags** group on the ribbon and then select a category from the list.

If you don't see **Categorize** on the Ribbon, select the drop-down under **Tags**.



Note: The **Categorize** drop-down displays the ten most recently used categories. If you have additional categories, you'll need to select **All Categories** to see the rest of the list.

Add contacts to color categories

Organize your contacts with color categories

Contact list getting a little overwhelming? The fastest way to organize your contacts is by color—such as blue for coworkers, red for family and friends, and green for community organizations and members. Either use the built-in color categories or create your own, and rename them to something meaningful (such as “Coworkers” instead of “Blue”). Then sort by color to focus on the contacts you want.

The built-in color categories include blue, orange, purple, red, yellow, and green. To add an existing contact to one of these categories:

1. Click **People**.

If you see icons instead of words, you can click the People icon or use the tip below to change what you see.

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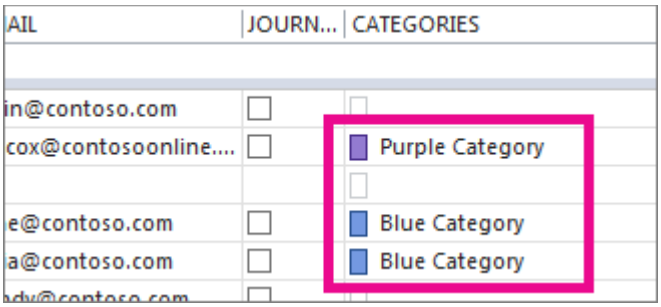
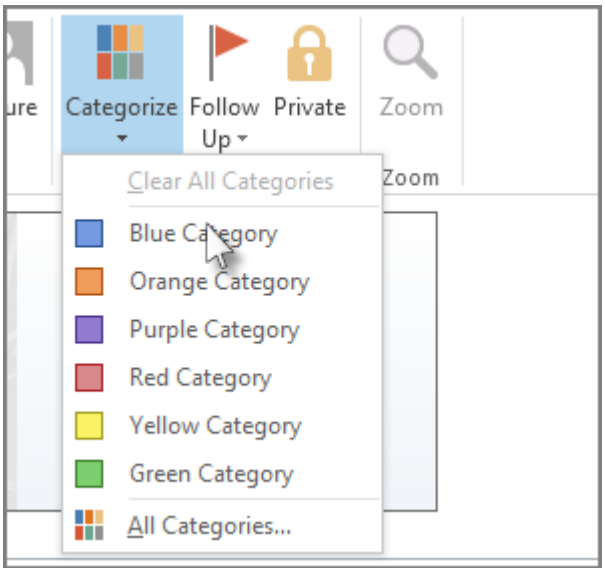
Tip: To change navigation options from icons to words, click the three dots next to the icons, click **Navigation Options...**, and uncheck **Compact Navigation**.

2. Right-click the contact you want to categorize, click **Categorize**, and then click the color you want.
3. To tell what category a contact has been assigned to, in your list of contacts (**View** > **Current View** > **Change View** > **List**), scroll to the right to see the **Categories** column. Any assigned categories will appear there.



Tips:

- When you create a contact, you can also assign it to a color category. When filling in all the new contact information in the **Contact** box, click **Categorize**, and then pick the category you want.



Rename a color category

To help you remember what a color category is for, you can change its name to something more meaningful. For example, if you're using the **Blue Category** for coworkers, you can rename it **Coworkers**.

1. Click **People** > **Home** > **Categorize** > **All Categories**.
2. Click the category you want to rename, and then click **Rename**.

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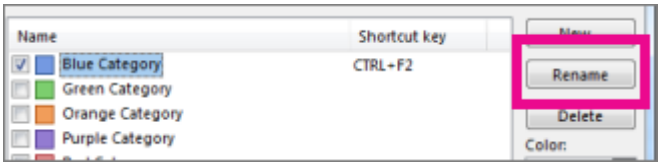


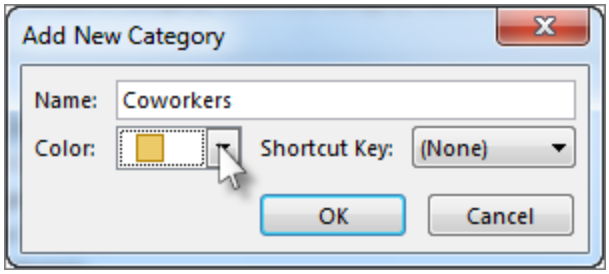
3. Type your new category name.

Tip: To make it easy to add contacts to this category, pick a shortcut under **Shortcut Key**. Then, the next time you want to assign contacts to this category, select them in your contact list and press the shortcut key.

Create a color category

Want to use a different color for a category? Just create one.

1. Click **People** > **Home** > **Categorize** >**All Categories**.
2. Click **New**, type the name you want to use, and then click the arrow next to the **Color** box to pick your color.



Tip: To make it easy to add contacts to this category, pick a shortcut under **Shortcut Key**. Then the next time you want to assign contacts to this category, select them in your contact list and press the shortcut key.

Sort contacts by color category

When you're done assigning color categories to people, you can quickly sort your contacts by color to see the ones you want.

1. Click **People**.

2. Click **Home**, and then in the **Current View** group, click **List**.
3. Scroll all the way to the right in your list of contacts to see the **Categories** column.

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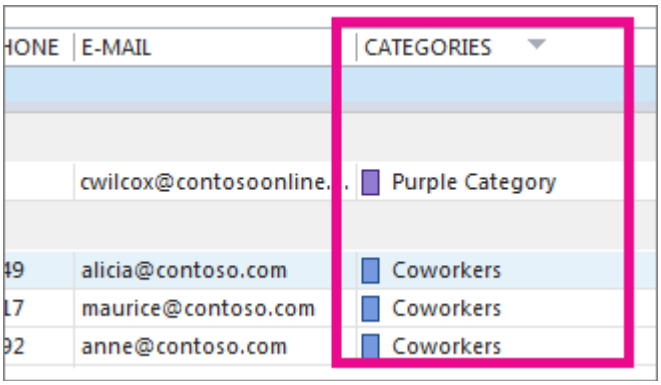
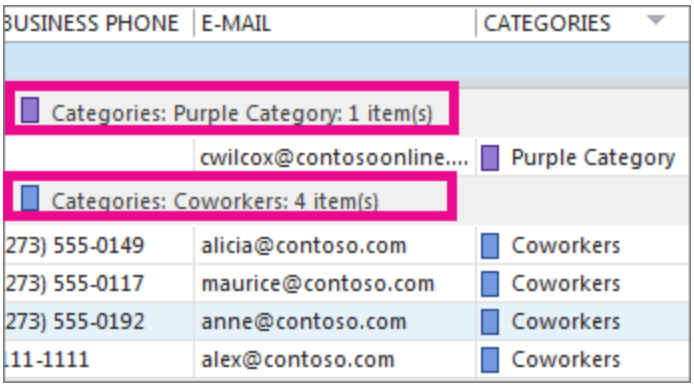


4. Click the **Categories** column header to sort the list by color. For each category, you'll see a subheading with a list of all the contacts in that category.



Assign a color category to a calendar appointment, meeting, or event

You can track all items related to a particular project or task by using color categories to easily identify and organize the items. Besides calendar items, you can assign color categories to contacts, messages, tasks, notes, and journal items. Color categories connect your calendar items for easy identification. The color categories connect you to other related items too, such as messages or contacts.

Categories only apply to items in your calendar. If you apply a color category to a meeting request or a meeting you've received from another person, that color category will only show in your calendar.

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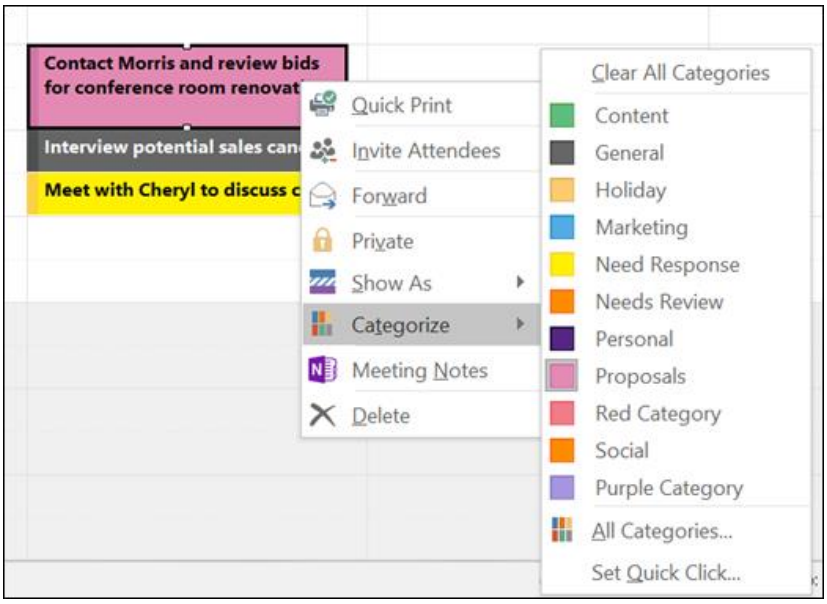
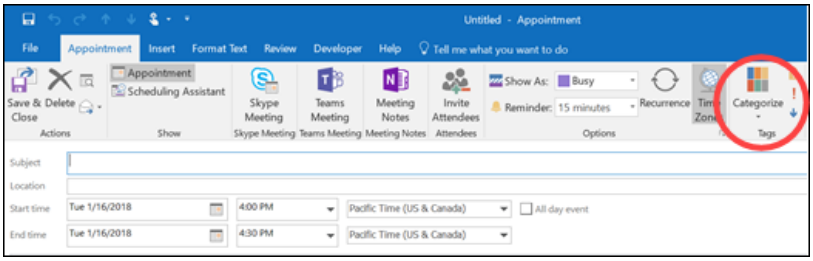


The same categories list is used for all Outlook items, including email messages, tasks, and contacts. If you don't see the category you need in the list, choose All Categories. From there, you can view additional categories not shown on the right-click menu or create and assign new color categories. For more information on creating and assigning your own color categories, see Create and assign color categories.

To assign a color category to an appointment, meeting, or event, use one of the following options:

- From your main calendar view, right click the appointment, meeting, or event, point to **Categorize**, and then click a color category.
- From an open appointment, meeting, or event, look for the **Categorize** button on the ribbon, in the **Tags** group.



To see more categories or to create a new category, click **All Categories** to open the **Color Categories** dialog box.

To assign a color category from the **Color Categories** dialog box, select the check box next to the color category.

The **Color Categories** dialog box is also a quick way to assign multiple categories to an item.

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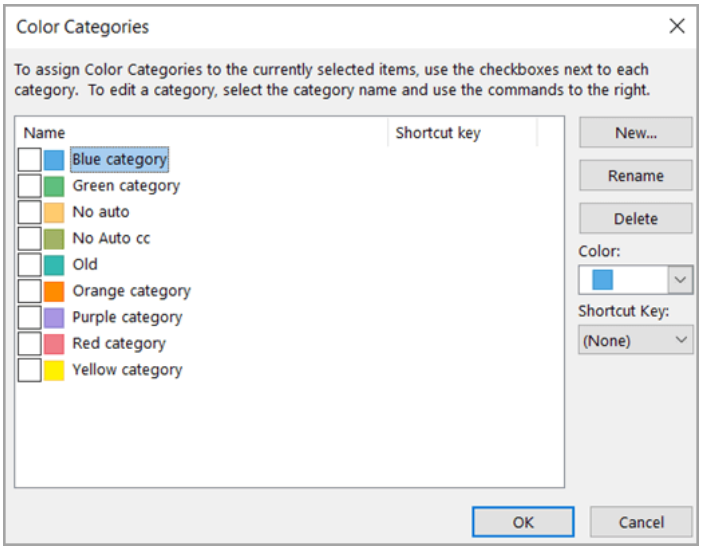
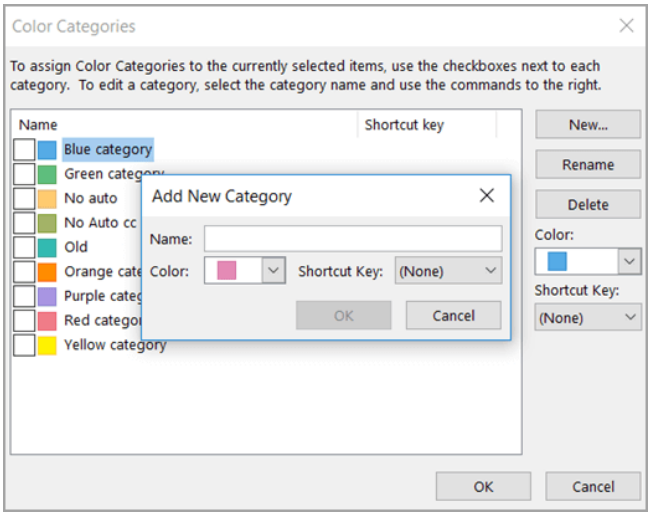


The first time that you assign a default color category to an item, you will be prompted to rename the category. At this time, you can also change the color of the category and choose a keyboard shortcut.



Notes:

- You can change the color associated with a category at any time.
- Another way to open the **Categorize** menu and **Color Categories** dialog box is by clicking **Categorize** on the toolbar.
- Only the 15 most recently used color categories appear on the **Categorize** menu. To see the rest, click **All Categories** on the **Categorize** menu.

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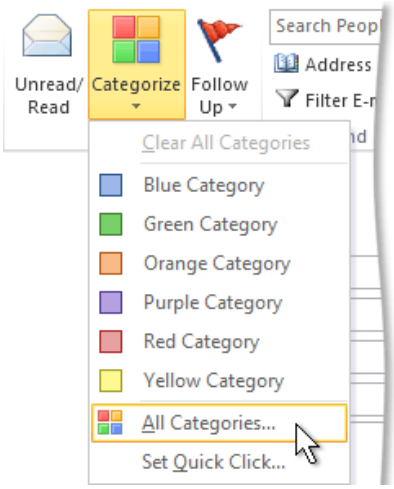
Rename a color category

Color categories are a great way to visually group similar messages, tasks, contacts, or calendar events.

1. Select an Outlook item (either an email, calendar event, contact, or task.
2. In the **Tags** group on the Ribbon, click **Categorize**, and then click **All Categories**.



Note: For an open calendar items, the **Tags** group appears on the **Appointment** or **Meeting** tab. For an open contact or task, the **Tags** group appears on the **Contact** or **Task** tab.

3. Click a category, and then click **Rename**.
4. Type the new name for the color category, and then press Enter.

For more information, please refer to the Microsoft training resource page HERE