



Incoming Mail Organizer

User's Manual

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Welcome

Thank you for choosing the Incoming Mail Organizer add-in, created by Sperry Software. This add-in keeps your email life organized by automatically filing your incoming email into the appropriate folders. It works based on who you're sending to, specific keywords, or it can be set up to prompt you each time where to save the email. It can even do all three, and you decide which of the method rules runs first. Like all Sperry Software add-ins, it works with Microsoft Exchange Server but doesn't require it.

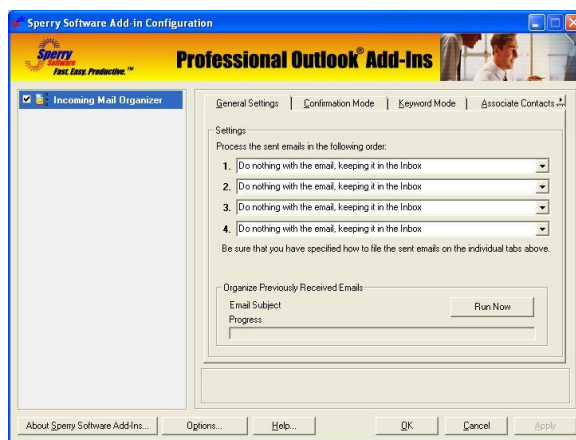
Configuring the Add-in

Once the installation is complete, you are ready to use Incoming Mail Organizer. When you open Outlook you will notice a new button “Sperry Software Add-ins” added to the toolbar.



Clicking this button displays the Sperry Software Add-ins configuration screen. It is on this screen that settings are made to control the add-in’s functionality.

General Settings Tab



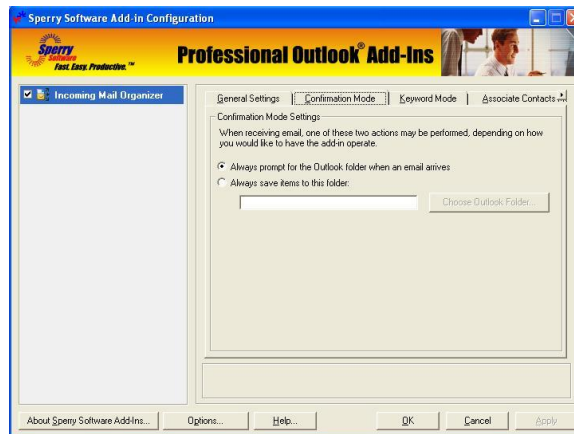
To begin using it, it’s best to set up the keywords and/or contacts for each of the method rules according to the way you need to work. Once each of the methods have been set up, then you can decide the priority of the method rules by going to the “General Settings” tab and select each of the methods in turn, 1-4.

Note that you can keep any of the 4 choices as “Do nothing with the email, keeping it in the Inbox” to effectively turn that option off.

After you’ve selected the methods, you might want to run the add-in on all the email you’ve sent so far. To do that, click the “Run Now” button. You’ll have to apply your changes (if you haven’t already) before processing can begin. The add-in will begin moving your messages to the appropriate folders, and the progress bar will begin to slide across the window so you can monitor how long it’s going to take.

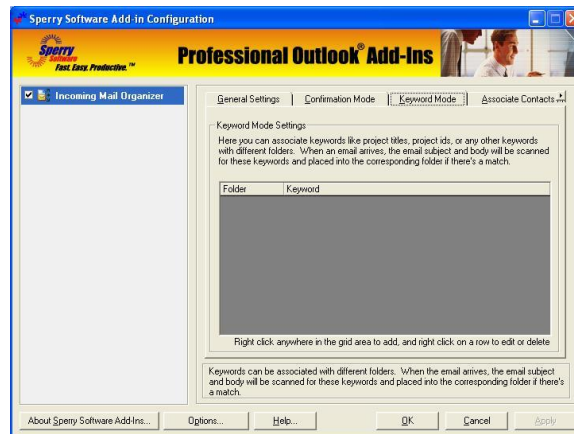
Note that a cancel button will appear where the “Run Now” button is – you can cancel the operation anytime you need to, but there is no undo function so the emails that have been moved already will be in their new location. Therefore, before performing a “Run Now” operation, make a copy of your Inbox folder so you can start over if necessary (or at least make sure you have recent backups).

Confirmation Mode Tab



This area allows you to either set a prompt to occur that will prompt you each time an email arrives as to where to save it (useful for people that have a large number of projects or assignments that need to be saved in different folders) or it can be set to always save your Outlook emails to the folder of your choice (which is good for say, architects, engineers, or lawyers that work on one project for months at a time).

Keyword Mode Tab

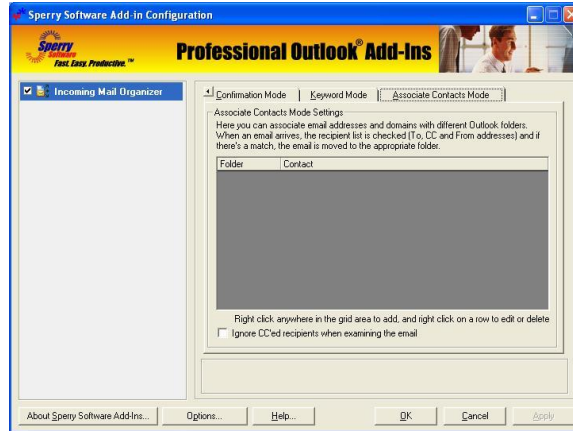


This tab provides options for specifying where to file the email when it has a keyword in the subject or body.

To add a new keyword, right click anywhere in the grid area and choose Add. This will bring up a window that allows you to specify a set of keywords and the corresponding Outlook folder where the emails will go when any of those keywords are found. You can have as many of these sets of keywords and associated Outlook folders as you like. This is useful for those situations where you work on more than one project at once, but frequently answer emails concerning more than one project. Simply add the keywords separated by commas (they are always case insensitive), and choose the Outlook folder where the emails containing these keywords should go. The keywords accept wildcard characters (the asterisk and the question mark).

After you've entered a row, you can come back and edit (or delete) any item by right clicking on that row.

Associate Contacts Mode Tab

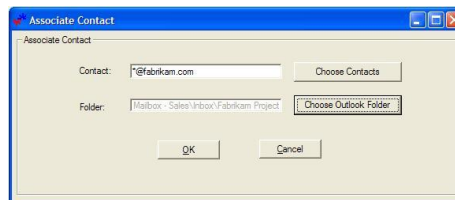


This tab provides options for specifying where to file the email when you an email from people that are in your address book.

To associate an address to an Outlook folder, right click in the grid area and choose Add. This will bring up a window that allows you to specify addresses and the Outlook folder where the emails will go when receiving from any of those addresses. Like the Keyword mode, you can have as many of these sets of addresses and associated Outlook folders as you like.

Note that when you select more than one email address for a particular Outlook folder, the email addresses are separated by semicolons. This is expected (i.e., you do not separate addresses with a comma like the keywords above).

You can use wildcards in the email addresses as well, to force all emails coming from a particular domain to one folder. For instance, if you need to save all emails going to the Fabrikam company to your Outlook "Fabrikam Project" folder, then just specify this:



This will cause emails to (for example) joe@fabrikam.com and accounting@fabrikam.com to go to the Fabrikam project folder.

Again just like the Keyword Mode, you can edit or delete any items by right clicking on a row.

Troubleshooting

Q. The “Sperry Software Add-ins” button is not visible.

A. The add-in may have become disabled.

For Outlook 2002, 2003 users:

On the Outlook Menu, click Help...About Microsoft Outlook

Click the “Disabled Items” button

If “Sperry Software” is listed, enable it and restart Outlook

For Outlook 2007 users:

On the Outlook Menu, click Help...Disabled Items

If “Sperry Software” is listed, enable it and restart Outlook

The Sperry Software toolbar may not be set to “Visible”

On the Outlook Menu, click View...Toolbars and make sure that Sperry Software is checked.

Q. The “Sperry Software Add-ins” button does not respond.

A. Run the add-in Reset tool.

The add-in reset tool can be downloaded from

<http://www.sperrysoftware.com/outlook/tools.asp>

Q. How can we contact you for more help?

A. For help on more in-depth issues, check out our [Knowledge Base](#).