



Sent Items Organizer

User's Manual

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Welcome

Thank you for choosing the Sent Items Organizer add-in, created by Sperry Software. This add-in keeps your email life organized by automatically filing your sent items 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 Sent Items Organizer. When you open Outlook you will notice a new button "Sperry Software Add-ins" added to the toolbar.

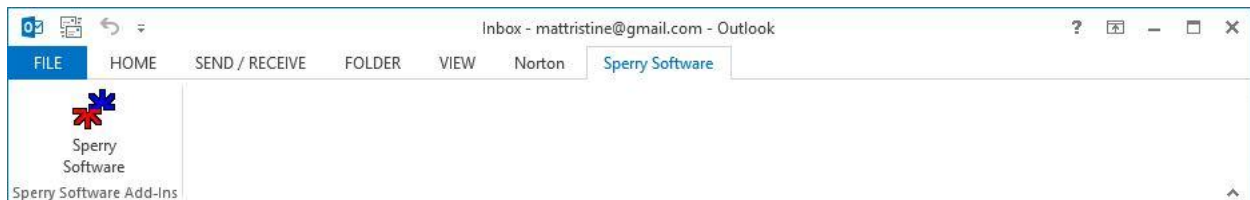


Figure 1 - Toolbar on Outlook 2013

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

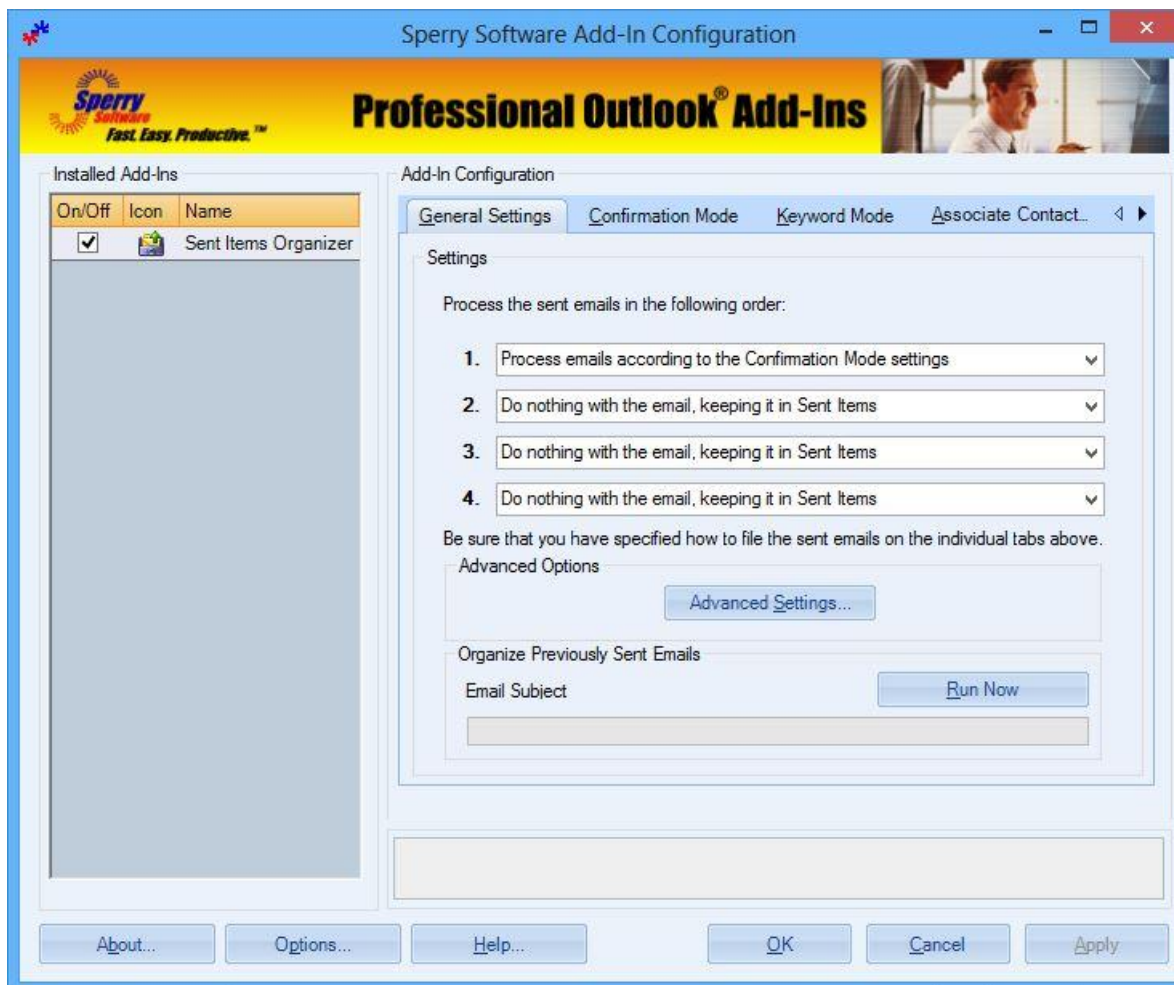


Figure 2 - General Settings Window on Outlook 2013

To begin using the add-in, 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 Sent Items" to effectively turn that option off.

Selecting the "Advanced Settings" button will open up a new window with some advanced user options. Those include overriding the default send button with these settings, moving the emails instead of copying them, and index settings for Exchange Public Folders.

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 Sent Items folder so you can start over if necessary (or at least make sure you have recent backups).

Confirmation Mode



Figure 3 - Confirmation Mode Window on Outlook 2013

This area allows you to set a prompt to occur that will prompt you each time an email is sent 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 or engineers that work on one project for months at a time).

If you choose the 2nd method, then you also have the ability to save the email to a separate folder when sending from an Outlook mailbox that is different than the default. You can filter emails that come from two other mailboxes.

To set up the From account, type in the name of the “From” mailbox or the email address. Then, click on the “Choose Outlook Folder” button to select the folder where the emails should go. That’s it! The next time you send an email from that other account, it will appear in the folder you selected rather than your regular Inbox. Having this feature makes it easy for groups of people to work together so that the emails all appear in the Sent Items folder of that other mailbox (which is probably shared among several people).

You can add multiple From accounts (if they are all going to the same Outlook folder) with semicolons (they’re case insensitive), and use can use wildcards to cover entire domains just like the other fields in the add-in.

Note that you can still select your regular Sent Items in the “Always save items to this folder” box, and just shunt the emails that you send from the other mailboxes sent to their respective folders.

Keyword Mode

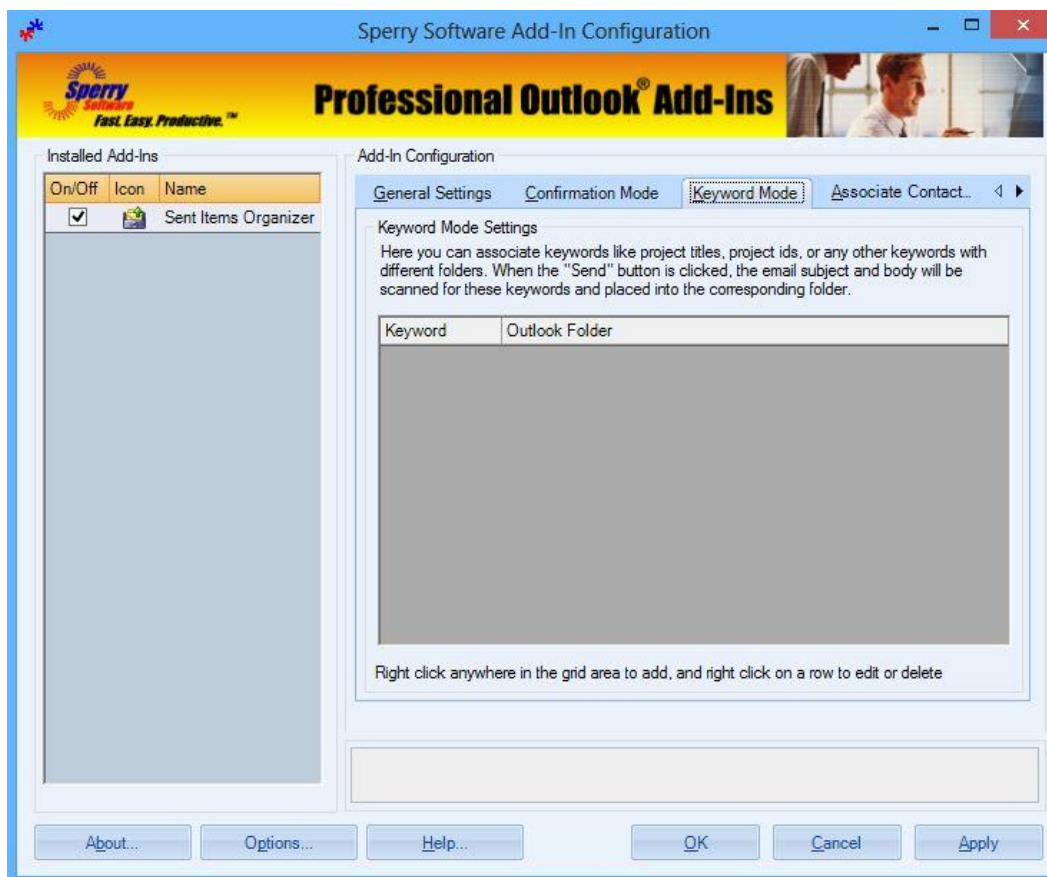


Figure 4 - Keyword Mode Window on Outlook 2013

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

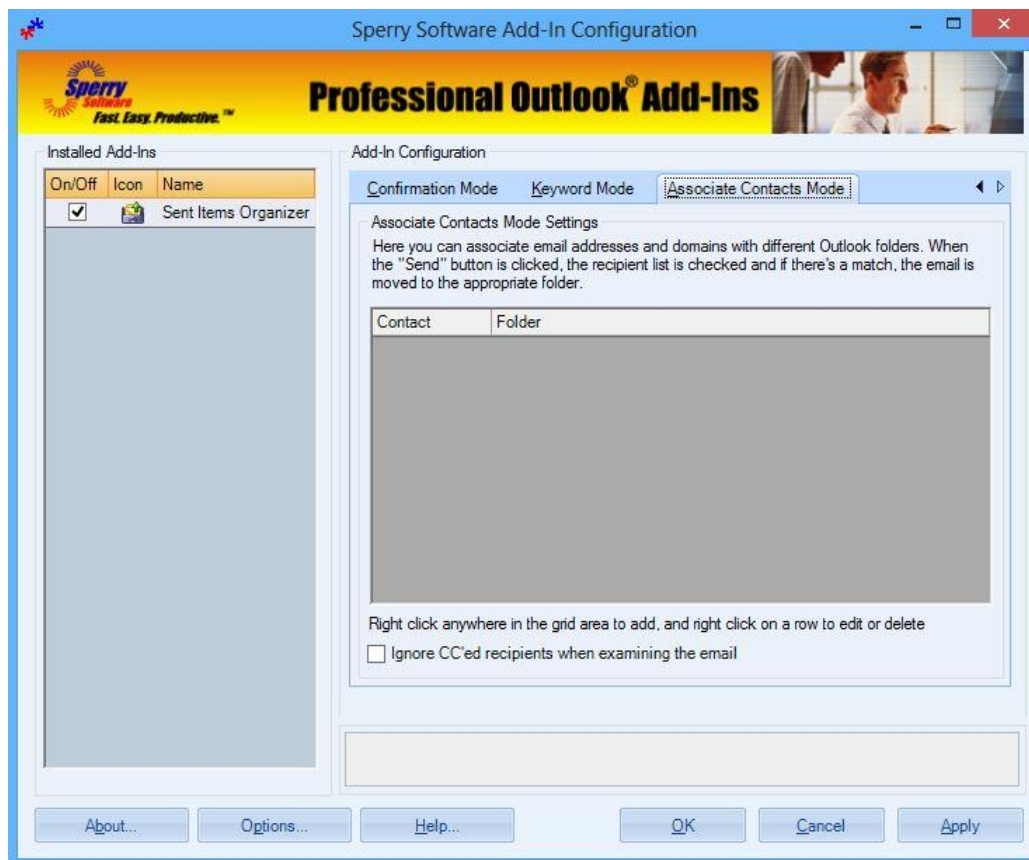


Figure 5 - Associate Contacts Mode Window in Outlook 2013

This tab provides options for specifying where to file the email when you are sending to 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 sending to 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 going to 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:

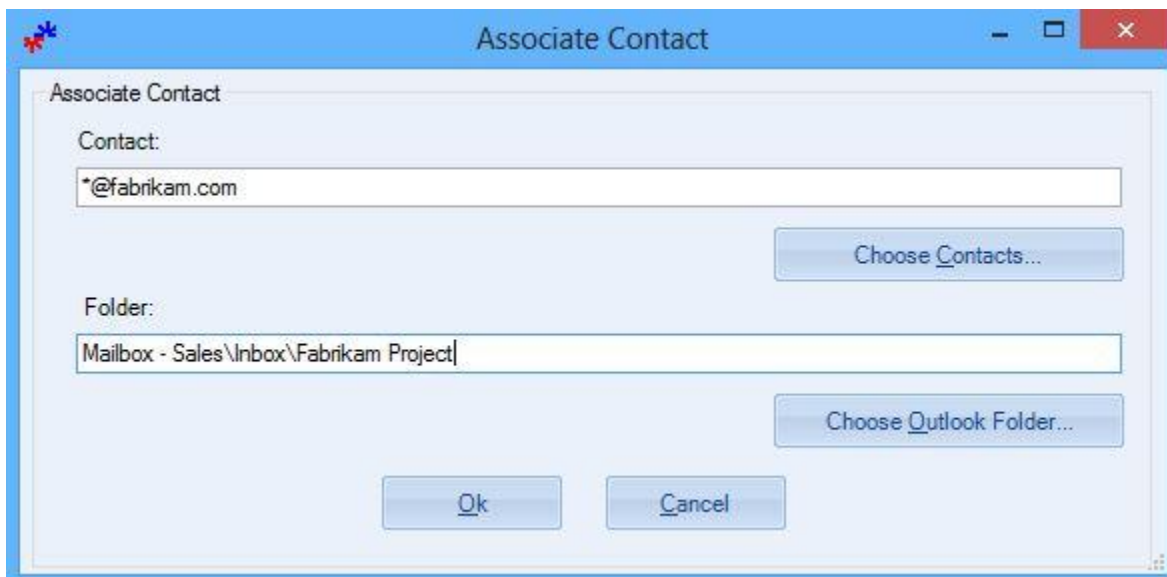


Figure 6 - Sample Associate Contact Entry on Outlook 2013

This will cause emails sent 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. I'm having trouble, and need to start over with installing. What can I do?

A. Follow these instructions:

<http://www.sperrysoftware.com/kb/questions/98/I%27m+having+problems%2C+and+I+need+to+reinstall+my+add-ins+from+a+clean+start.+How+do+I+do+this%3F+>

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

A. Run the add-in Reset tool.

The add-in reset tool (among others) 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](#).