SETTING UP CLIENT FOLDERS IN OUTLOOK

Lawyers can use electronic folders within Outlook to organize incoming and outgoing email messages for various clients or matters. The instructions below demonstrate how to create electronic client folders. These instructions are for desktop and web-based versions of Microsoft Outlook for Microsoft 365, but the steps described may be helpful in creating client folders in other email programs.

Create a "CLIENTS" Folder

Desktop-based Outlook:

1. With Microsoft Outlook open, click the **Home** tab.
2. Right click on your **Inbox** folder. A dialog box will appear.
3. Select **New Folder…**. A blank text box will appear beneath your Inbox.
4. Type the folder name "CLIENTS".
5. Hit **Enter**.

Web-based Outlook:

1. With Microsoft Outlook open, click the **Home** tab.
2. A new folder can be created in two ways:
   a. Either click **Create new folder** at the bottom of the folder list;
   b. Or right click on **Folders** and select **Create new folder** from the dialog box.
3. A blank text box will appear at the bottom of your folder list.
4. Type the folder name "CLIENTS".
5. Hit **Enter**.

Create Individual Client Subfolders

Desktop-based Outlook:

1. Right click on your **CLIENTS** folder. A dialog box will appear.
2. Select **New Folder…**. A blank text box will appear beneath your Inbox.
3. Type a client name for the first subfolder (i.e., Smith, Nancy).
4. Hit **Enter**.
5. Repeat steps 1-4 to create a subfolder for each open client matter.

Web-based Outlook:

1. Right click on your **CLIENTS** folder. A dialog box will appear.
2. Select **Create new subfolder…**. A blank text box will appear beneath your Inbox.
3. Type a client name for the first subfolder (i.e., Smith, Nancy).
4. Hit **Enter**.
5. Repeat steps 1-4 to create a subfolder for each open client matter.

Move Emails from Inbox to Specific Client Subfolders

Desktop-based Outlook:

1. Select your **Inbox**. Use the title bar above your email messages to sort your Inbox. Under **Arrange** by, click **From** to sort your messages by sender. Messages will automatically be sorted in order ascending from A to Z.
2. Scroll down to find and select messages to be moved to the applicable client subfolder (i.e., Nancy Smith).
3. To select an entire group of emails from one sender, click the first message. Press and

hold **Shift**. Then click the last message.

4. To select messages from different senders at once (or messages that are otherwise non-adjacent), click the first message. Press and hold **Ctrl**. Then click the individual messages.
5. Right click. A dialog box will appear. Select **Move**. Another dialog box will appear. Select the appropriate client folder (i.e., Smith, Nancy). Selected messages are then moved to the chosen client folder.
6. NOTE: Beware that when you select **Move**, you have the option to "Copy to Folder" or "Always Move Messages in this Conversation." Copy to Folder means a copy is placed in the folder you choose (i.e., Smith, Nancy), but the original message remains in your Inbox. Always Move Messages in this Conversation means current *and* future messages in the chosen email thread will be moved to the chosen folder.
7. Rather than using the **Move** function, you can also simply drag and drop the selected email messages to the specific client subfolder. Those messages are then moved to the client subfolder and no copy remains in your inbox, yet any new emails from a conversation that has been moved still show up in your Inbox.

Web-based Outlook:

1. Select your **Inbox**. Then select **Filter** in the title bar above your email messages. Click **Sort**. Under **Sort by,** choose **From** to sort your messages by sender. Messages will automatically be sorted in order ascending from A to Z.
2. Scroll down to find and select messages to be moved to the applicable client subfolder (i.e., Nancy Smith).
3. To select an entire group of emails from one sender, click the first message. Press and hold **Shift**. Then click the last message.
4. To select messages from different senders at once (or messages that are otherwise non-adjacent), click the first message. Press and hold **Ctrl**. Then click the individual messages. In the alternative, you can select individual messages by clicking the radial button to the left of each email to which an action will be applied.
5. Right click. A dialog box will appear. Select **Move**. Another dialog box will appear. Select **Move to a different folder.** Then select the appropriate client folder (i.e., Smith, Nancy). Selected messages are then moved to the chosen client folder.
6. Rather than using the **Move** function, you can also simply drag and drop the selected email messages to the specific client subfolder. Those messages are then moved to the client subfolder and no copy remains in your inbox, yet any new emails from a conversation that has been moved still show up in your Inbox.

Move Emails from Outbox to Specific Client Subfolders

Desktop-based Outlook:

If you send an email, it automatically goes to your Sent Items folder but is not saved to a specific client subfolder. How you move Sent Items depends on whether you utilize the Show as Conversations view, which is explained in the practice aid titled "View Email Messages By Conversation in Outlook." In order to make sure your sent emails are being saved in specific client subfolders, you need to do the following:

1. **If you do not have conversation view**:
    a. Select your **Sent Items**. Use the title bar above your email messages to sort your

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Outbox. Under **Arrange** by, click the **TO** column to sort your messages by recipient. Messages will automatically be sorted in order ascending from A to Z.

b. Scroll down to find and select messages to be moved to the applicable client subfolder (i.e., Nancy Smith).
c. To select an entire group of emails from one sender, click the first message. Press and hold **Shift**. Then click the last message.
d. To select messages to different recipients at once (or messages that are otherwise non-adjacent), click the first message. Press and hold **Ctrl**. Then click the individual messages.
e. Right click. A dialog box will appear. Select **Move**. Another dialog box will appear. Select the appropriate client folder (i.e., Smith, Nancy). Selected messages are then moved to the chosen client folder.
f. NOTE: Beware that when you select **Move**, you have the option to "Copy to Folder" or "Always Move Messages in this Conversation." Copy to Folder means a copy is placed in the folder you choose (i.e., Smith, Nancy), but the original message remains in your Outbox. Always Move Messages in this Conversation means current *and* future messages in the chosen email thread will be moved to the chosen folder.
g. Rather than using the **Move** function, you can also simply drag and drop the selected email messages to the specific client subfolder. Those messages are then moved to the client subfolder and no copy remains in your Outbox, yet any new emails from a conversation that has been moved still show up in your Outbox.

2. **If you have conversation view:**
    a. If you have conversation view, that means multiple emails within a conversation, or those with the same subject line, are viewed in chronological order.
    b. Find the conversation(s) you wish to move. You can do this by sorting the conversations from A to Z or by searching for a particular name.
    c. Scroll down to find and select conversations to be moved to the applicable client subfolder (i.e., Smith, Nancy).
    d. To select an entire group of emails located in a conversation, click the first message. Press and hold **Shift.** Then click the last message.
    e. Right click. A dialog box will appear. Select **Move.** Another dialog box will appear. Select the appropriate client folder (i.e., Smith, Nancy). Selected messages are then moved to the chosen client folder.
    f. NOTE: Beware that when you select **Move,** you have the option to "Copy to Folder or "Always Move Messages in this Conversation." Copy to Folder means a copy is placed in the folder you choose (i.e., Smith, Nancy), but the original conversation remains in your inbox. Always Move Messages in this Conversation means current *and* future messages in the chosen email thread will be moved to the chosen folder.
    g. Rather than using the **Move** function, you can also simply drag and drop the conversation to the specific client subfolder. Those messages are then moved to the client subfolder.
    h. But remember that if only one email is sent and no response is received, you will need to later manually access your Sent Items folder and move that email to the specific client subfolder.

Web-based Outlook:

If you send an email, it automatically goes to your Sent Items folder but is not saved to a

specific client subfolder. In order to make sure your sent emails are being saved in specific client subfolders you need to do the following:

1. **Saving sent emails to specific client subfolders**:
   a. Select your **Sent Items**. Unlike desktop-based Outlook, you cannot sort emails from your Outbox using the standard filter function. Instead, within the search bar at the top of screen, click the **Filter** icon, which is represented by an icon of three perpendicular lines. In the **To field** enter the name or email address of the recipient. Then click the **Search** button. Messages will be sorted chronologically.
   b. Scroll down to find and select messages to be moved to the applicable client subfolder (i.e., Nancy Smith).
   c. To select an entire group of emails from one sender, click the first message. Press and hold **Shift**. Then click the last message.
   d. To select messages to different recipients at once (or messages that are otherwise non-adjacent), click the first message. Press and hold **Ctrl**. Then click the individual messages. In the alternative, you can select individual messages by clicking the radial button to the left of each email to which an action will be applied.
   e. Right click. A dialog box will appear. Select **Move**. Another dialog box will appear. Select the appropriate client folder (i.e., Smith, Nancy). Selected messages are then moved to the chosen client folder.
   f. Rather than using the **Move** function, you can also simply drag and drop the selected email messages to the specific client subfolder. Those messages are then moved to the client subfolder and no copy remains in your Outbox, yet any new emails from a conversation that has been moved still show up in your Outbox.

IMPORTANT NOTICES