

SETTING UP REMINDERS FOR OUTGOING EMAILS IN OUTLOOK

Lawyers can set up reminders for outgoing emails in Outlook. Many lawyers often send out emails but can't rely on the recipient to respond or complete the task within the requested period of time, if at all. Setting up a reminder for an outgoing email allows you to send an email and simultaneously create a reminder for yourself to follow up. 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.

Desktop-based Outlook:

1. If you've already sent the email, select the message and right click. Scroll down and choose **Follow Up**. Then choose **Add Reminder**.
2. In the **Custom** dialog box, in the **Flag to** option, choose how you would like to follow up on the email (e.g., Follow up, Call, Review).
3. Then choose a start date and a due date.
4. Then check the box labeled **Reminder**, and choose the date and time you would like to be reminded of the follow up. You can also enable this function at the same time as sending the email by choosing **Follow Up** in the **Tags** section of the header when creating the email.
5. This does not create an event in your calendar. It creates an item in your To-Do list and a reminder that will pop up at the specified time. You can create an event in your calendar by right clicking on the sent email and select **Move**, then **Copy to Folder**, and choose to move the email to your **Calendar**. This will maintain a copy of the email in your outbox in addition to creating a new calendar event with the specified follow up information. You can also simply drag and drop a received or sent email directly to your calendar to create a new calendar entry. This will turn the email directly into a calendar entry and the contents of the email will appear in the notes field of the calendar entry.

Web-based Outlook:

1. If you've already sent the email, select the message.
2. In the **Home** ribbon bar, click the caret symbol next to the **Flag** icon.
3. From the drop-down menu, select a follow-up date.
4. This will also create a task in your **My Day** calendar. To view the **My Day** calendar, click the **My Day** icon, which is located at the top-right and is represented by a calendar with a check mark, and then select **Calendar**. This does not create an event in your calendar. You can create an event in your calendar by selecting an email, clicking the **More actions** icon which is represented by three dots. Select **Other reply actions** and then **Reply all by meeting**. This will prompt the creation of a calendar event that includes the contents of the email as a note. Be careful to confirm who you would like to participate in this event as the default is to include all participants in the email selected.
5. Another option to create an event in your calendar from an email is to drag and drop a received or sent email directly to your **My Day** calendar. This will turn the email directly into a calendar entry and the contents of the email will appear in the notes field of the calendar entry.

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