You've Got Mail. A Lot of It.
How to Organize the Chaos in Your Inbox

Contents

POP vs. IMAP EMAIL

There are two types of email accounts, POP (Post Office Protocol) and IMAP (Internet Message Access Protocol). The basic difference is that emails can only be read on a *single* computer with POP but on *multiple* computers or even on the internet with IMAP.

The reason is that when your computer receives a message from a POP account the copy is removed from your email provider's server and exists only on the computer that received it*. With an IMAP account, a *copy* is downloaded to the receiving computer, but the original message remains on the email provider's server and can be read and/or downloaded by other computers/devices as well, say your laptop, iPhone, or even someone else's computer that you have access to while you are away.

* Thanks to Riley Price, Alan Oppenheimer and Todd Derek for pointing out that with most POP accounts, the messages down't go away immediately. There is an option to delay removing them from the server for "x" days.

Here is a graphical example with a simplified listing (only sender and subject) of emails.

From	Subject
Paul Simon	**Dinner Saturday night**
Art Garfunkle	**Fw: Plans for the drop-leaf table**
Peter Yarrow	**AshMug handouts**
Paul Stookey	**Visit at Thanksgiving**
Mary Travers	**Here's the recipe for Slumgullion**
Paul Simon	**Do you have Art's email?**
Paul Stookey	**Woodworking club meeting**
Art Garfunkle	**Pictures that Paul sent me**
Peter Yarrow	**Re: Principles of Confabulatory Obfuscation**

Suppose we have the following emails on a POP mail server, for example, charter.net

You start up Apple Mail on your desktop iMac, and in a few minutes...

POP Email Account

...this is what you see in the Inbox.

From	Subject
Paul Simon	**Dinner Saturday night**
Art Garfunkle	**Fw: Plans for the drop-leaf table**
Peter Yarrow	**AshMug handouts**
Paul Stookey	**Visit at Thanksgiving**
Mary Travers	**Here's the recipe for Slumgullion**
Paul Simon	**Do you have Art's email?**
Paul Stookey	**Woodworking club meeting**
Art Garfunkle	**Pictures that Paul sent me**
Peter Yarrow	**Re: Principles of Confabulatory Obfuscation**

A week later you start up Apple Mail on your MacBook

From	Subject

and this is what you see in your Inbox on this computer.

IMAP Email Account

When you start Apple Mail on your iMac, this is what you see in the Inbox.

From	Subject
Paul Simon	**Dinner Saturday night**
Art Garfunkle	**Fw: Plans for the drop-leaf table**
Peter Yarrow	**AshMug handouts**
Paul Stookey	**Visit at Thanksgiving**
Mary Travers	**Here's the recipe for Slumgullion**
Paul Simon	**Do you have Art's email?**
Paul Stookey	**Woodworking club meeting**
Art Garfunkle	**Pictures that Paul sent me**
Peter Yarrow	**Re: Principles of Confabulatory Obfuscation**

Now you start up Apple Mail on your Laptop

From	Subject
Paul Simon	**Dinner Saturday night**
Art Garfunkle	**Fw: Plans for the drop-leaf table**
Peter Yarrow	**AshMug handouts**
Paul Stookey	**Visit at Thanksgiving**
Mary Travers	**Here's the recipe for Slumgullion**
Paul Simon	**Do you have Art's email?**
Paul Stookey	**Woodworking club meeting**
Art Garfunkle	**Pictures that Paul sent me**
Peter Yarrow	**Re: Principles of Confabulatory Obfuscation**

and this is what you see in your Inbox on it because all the messages are still on your email provider's server.

IMAP Email Account

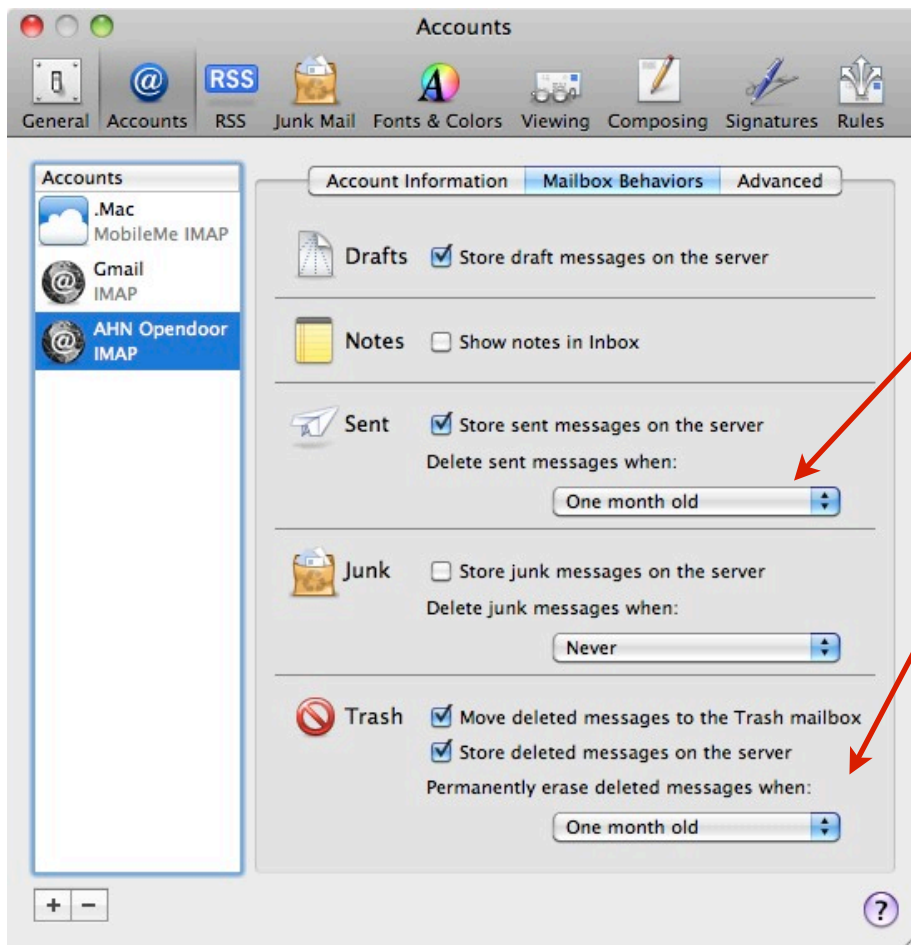**There is, of course, a limit to the number of messages that your email provider will store for you.** It's very large, but not infinite.

The main ways it is kept under control are

1) by you deleting messages and

2) settings in Mail Preferences that remove deleted and sent messages from the server

If you let too many messages (especially with big attachments) pile up in your account, you will get a warning from your email provider that your storage quota has been exceeded.

For instructions on setting up either POP or IMAP accounts in Apple Mail download the file "Setting up an Email Account.pdf: from http://www.ashmug.com/Page.asp?NavID=9

Moving Messages from a POP to an IMAP Account

If you have more than one computer or want to access your email away from home, the advantages of IMAP are obvious.

But there are a few email providers that still only provide POP accounts, Charter being the most prominent in this area.

Here is one way to move your messages from a POP account to an IMAP account:*

First, of course you will need an IMAP account. If your ISP doesn't have one, you can get one as part of Apple's MobileMe ($99/yr) or as free gmail account from Google.

After you have an IMAP account added to Apple Mail in addition to the POP account (see Page 5), go to Mail/Preferences/Rules to set up a rule like this example.
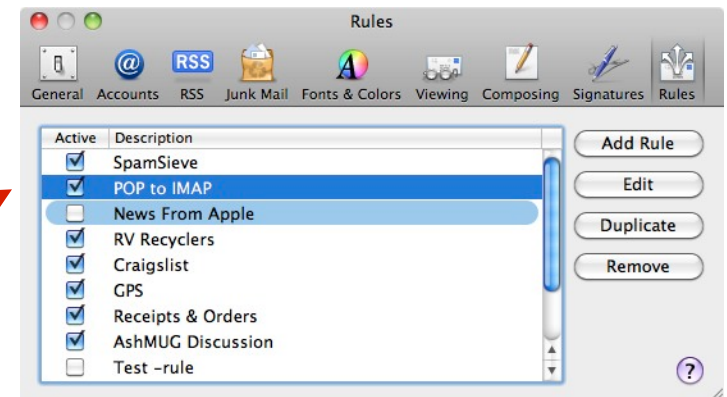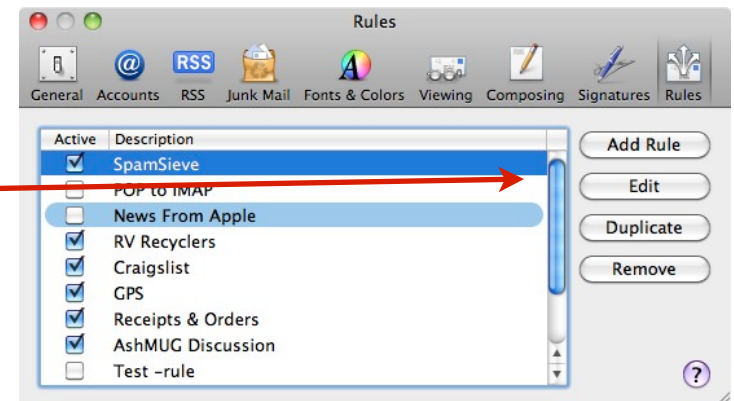
Click on Add Rule
to bring up the Rule window.
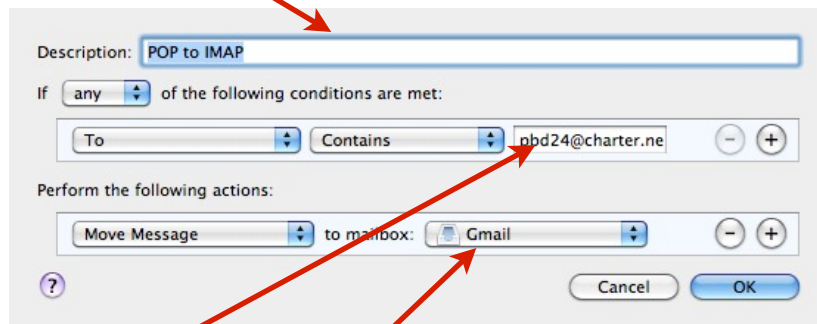
This should be your email address for the POP account

and this should be the Inbox of an IMAP account.

Finally, click OK then drag the rule to the top of the list, or to second from the top if you are using Spamsieve.

* As Riley Price pointed out, another, even simpler method is to have your email provider automatically forward all your messages to an IMAP account. Most email providers allow you to do this.

Organizing Your Mail to Tame the Chaos in Your Inbox

As hundreds or even thousands of messages accumulate in your inbox, it becomes more and more difficult to find the emails you want.

A good way to solve this problem is to put emails on specific subjects or from different frequent senders ins separate Mailboxes. There are two ways of doing this: Smart Mailboxes and regular Mailboxes. Each type has different characteristics and behaviors, and you can use both together for maximum advantage.

Smart Mailboxes

These are Mailboxes that use rules to gather together messages that meet criteria that you select. They are a lot like Playlists in iTunes or Groups in Address Book.

Important characteristics:

- They contain only an **alias** to the message; the original message stays in the Inbox.

- Only exist on the local computer on which they are created.

- *Only* the Rules determine what goes into the Smart Mailbox. Items cannot be manually moved into a Smart Mailbox.

- A message can be in multiple Smart Mailboxes simultaneously.

- When you set up Smart Mailbox rules, all qualifying messages already in other Mailboxes will be brought in.

- Deleting the Smart Mailbox itself does **no**t delete the original messages in the Inbox. BUT ...

- ...WARNING -selecting a message in the Smart Mailbox and deleting it **will** delete the original. *This is different behavior from iTunes Playlists and AddressBook Groups.*

"Regular" Mailboxes

These are Mailboxes that *can* use rules and/or accept messages moved manually to gather together messages that meet criteria that you select.

Important characteristics:

- They contain the **actual** message; the original message is removed from the Inbox.

- Can exist either on the IMAP Server or on the local computer.

- You *may* set up Rules (in Preferences) to determine what is moved to the Mailbox. Items can also be manually moved into or out of the Mailbox.

- A message can only be in a single regular mailbox (but can also be in Smart Mailboxes).

- If you set up Rules for a regular Mailbox, only new messages coming into the Inbox will be moved to the new Mailbox. (See note on next page.*)

- Deleting a regular Mailbox moves all of its contents to the trash.

- Deleting a message in the Mailbox will delete the original.

*Note: When you set up a rule in Preferences, there is an option to move qualifying messages from the currently *selected* Mailbox(es) to the new Mailbox, but it doesn't always work correctly. You can always move old messages to the new Mailbox manually by dragging and dropping.

Here are some examples of how Smart Mailboxes work using our simplified Apple Mail Inbox

From	Subject
Paul Simon	**Dinner Saturday night**
Art Garfunkle	**Fw: Plans for the drop-leaf table**
Peter Yarrow	**AshMug handouts**
Paul Stookey	**Visit at Thanksgiving**
Mary Travers	**Here's the recipe for Slumgullion**
Paul Simon	**Do you have Art's email?**
Paul Stookey	**Woodworking club meeting**
Art Garfunkle	**Pictures that Paul sent me**
Peter Yarrow	**Re: Principles of Confabulatory Obfuscation**

Smart Mailboxes are set up by going to Mailbox/New Smart Mailbox in the Mail Menu Bar. (If you ever have to change the settings for a Smart Mailbox, select it in the left sidebar and go to Mailbox/Edit Smart Mailbox.)

We set up a Smart Mailbox for Mary Travers

> Smart Mailbox Name: From Mary
>
> Contains [messages ▲▼] that match [all ▲▼] of the following conditions:
>
> [From ▲▼] [Contains ▲▼] [Mary Travers] ⊖ ⊕
>
> ☐ Include messages from Trash
> ☐ Include messages from Sent   (Cancel) (OK)

...and do the same for Peter Yarrow and Paul Stookey.

Next we set up a Smart Mailbox for our hobby, woodworking

Smart Mailbox Name: Woodworking

Contains [messages ⬍] that match [any ⬍] of the following conditions:

[Entire Message ⬍]	[Contains ⬍]	woodworking	⊖ ⊕
[Entire Message ⬍]	[Contains ⬍]	carpentry	⊖ ⊕

☐ Include messages from Trash
☐ Include messages from Sent   (Cancel) (OK)

Here is what the Inbox and our four Smart Mailboxes contain.

▶ 🗄 Inbox

From	Subject
Paul Simon	**Dinner Saturday night**
Art Garfunkle	**Fw: Plans for the drop-leaf table**
Peter Yarrow	**AshMug handouts**
Paul Stookey	**Visit at Thanksgiving**
Mary Travers	**Here's the recipe for Slumgullion**
Paul Simon	**Do you have Art's email?**
Paul Stookey	**Woodworking club meeting**
Art Garfunkle	**Pictures that Paul sent me**
Peter Yarrow	**Re: Principles of Confabulatory Obfuscation**

From	Subject
Mary Travers	**Here's the recipe for Slumgullion**

From	Subject
Peter Yarrow	**AshMug handouts**
Peter Yarrow	**Re: Principles of Confabulatory Obfuscation**

From	Subject
Paul Stookey	**Visit at Thanksgiving**
Paul Stookey	**Woodworking club meeting**

From	Subject
Paul Stookey	**Woodworking club meeting**

▼ SMART MAILBOXES
📁 From Mary
📁 From Peter
📁 From Paul
📁 Woodworking

Note that the same message exists in both the "From Paul" and "Woodworking" Smart Mailboxes.

However, we also had an email in the Inbox from Art Garfunkle about "Plans for the drop-leaf table" which we would also like to have in the Smart Mailbox "Woodworking". Unfortunately, with Smart Mailboxes, we can't manually move it there. We could edit the rules to include "table" but that might get a lot of non-woodworking messages. We would probably be better off with a "Regular" Mailbox (see p 11) for our Woodworking emails.

One of the other drawbacks to Smart Mailboxes are that they really don't de-clutter the Inbox. All the messages in the Smart Mailboxes are still in the Inbox (or other regular Mailboxes), making it more difficult to find the other messages there that are *not* in Smart Mailboxes. A way around this problem is to create a new Smart Mailbox with every message that isn't in some other Smart Mailbox, as shown below. Then you won't have to use your Inbox at all

Create a Smart Mailbox for all the messages not in the other Smart Mailboxes.

(Whenever you add other new Smart Mailboxes, you will have to edit the rules for this one.)

Smart Mailbox Name: All The Rest

Note

Contains [messages] that match [all] of the following conditions:

[Message is not in Mailbox] [From Mary]   ⊖ ⊕
[Message is not in Mailbox] [From Peter]   ⊖ ⊕
[Message is not in Mailbox] [From Paul]   ⊖ ⊕
[Message is not in Mailbox] [Woodworking]   ⊖ ⊕

☐ Include messages from Trash
☐ Include messages from Sent   (Cancel) (OK)
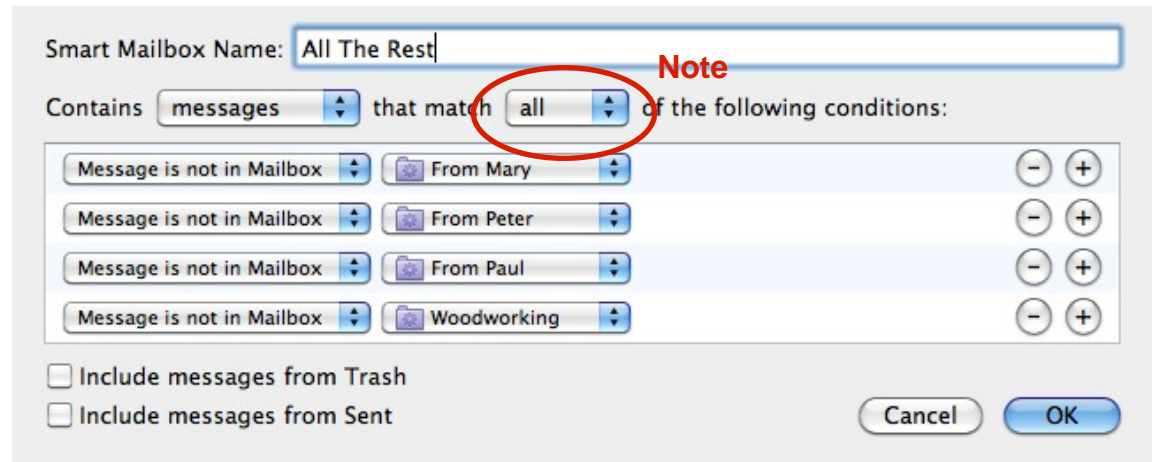
"Regular" Mailboxes

The first decision when creating a new regular Mailbox is where to put it. (With Smart Mailboxes, the only choice is on the local computer.)

The choices are:

-On the local computer ("On My Mac")
Messages in these Mailboxes are not available on any other computer.

-In an IMAP account
Messages in these Mailboxes are available on other computers and on-line.

Mailboxes are created by going to Mailbox/New Mailbox in the Mail Menu bar.Menu Bar. As an example we are going to create the same Mailboxes we created before as Smart Mailboxes, but this time as regular Mailboxes.
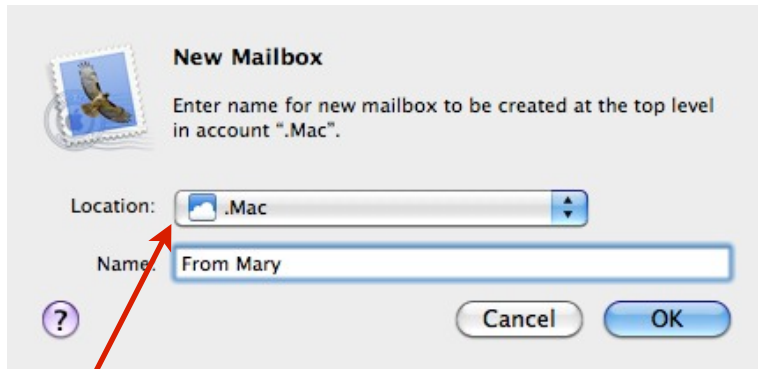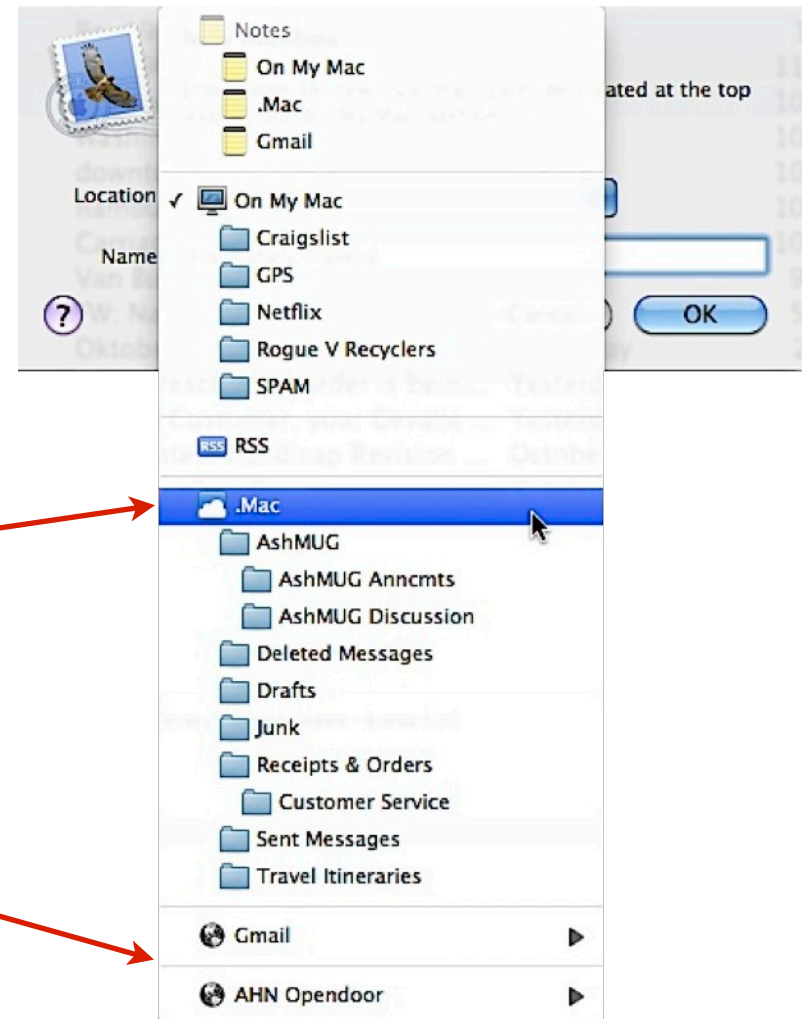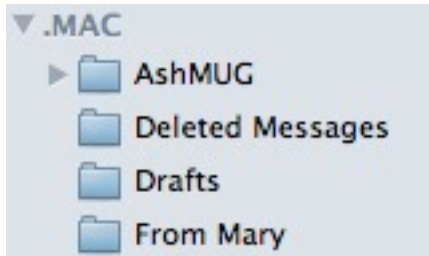

The default location is On My Mac (local computer only) but we want to have this mailbox in an IMAP account so it is available on my other computers as well.

Clicking on the Location Pull-Down menu brings up a list of available locations.

We are going to choose .Mac,

but could have selected one of the other IMAP accounts that I have, Gmail or AHN Opendoor

Here is the new Mailbox in the sidebar of the main Mail window.

So now we have a Mailbox, but we would like to have incoming mail from Mary Travers automatically put into it instead of the Inbox. We can do this with exactly the same kind of Rules that were used for Smart Mailboxes, but we have to go to Mail Preferences/Rules to set them. Let's do so for this new Mailbox.

As we did on p. 6, we go to Mail/ Preferences/Rules and click on Add Rule.
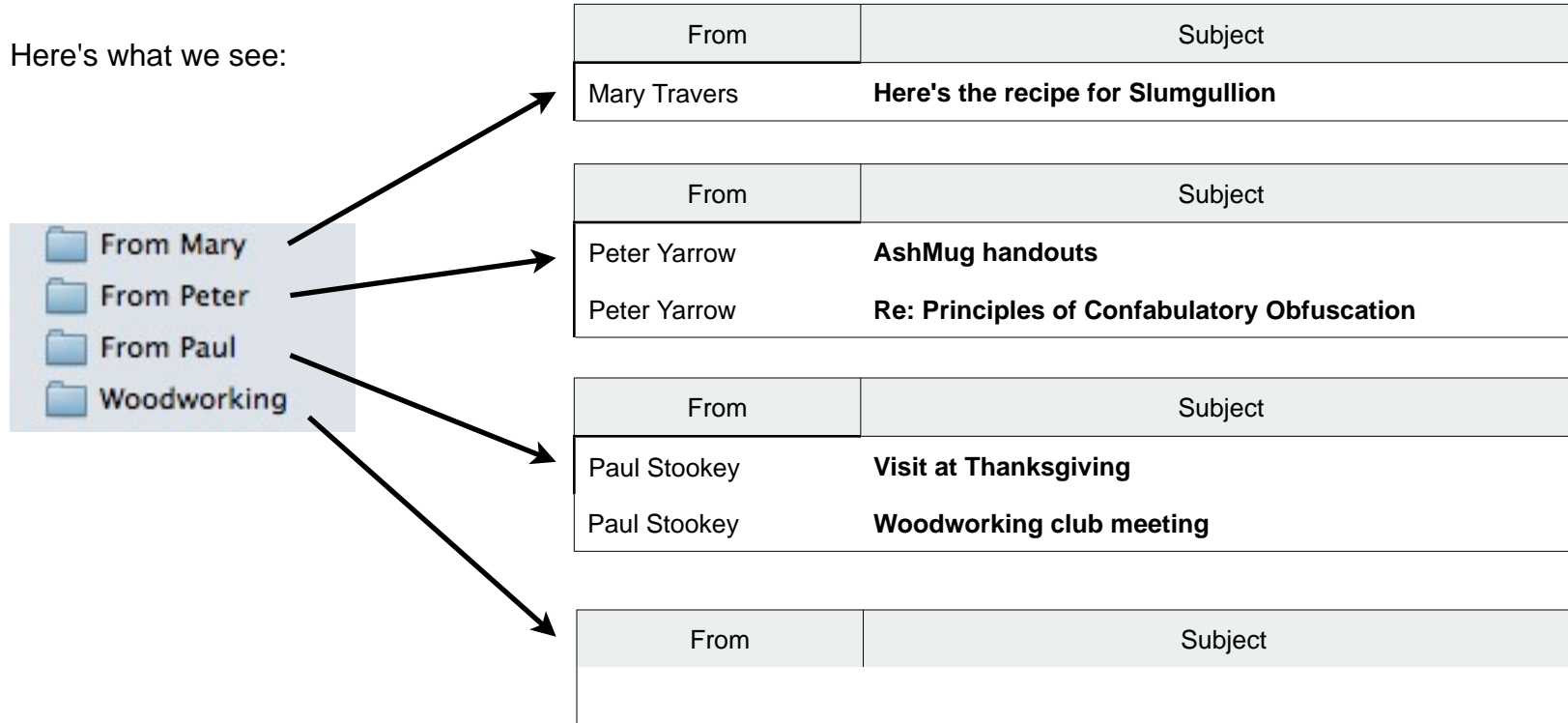
In the Rule window, we set one or more appropriate conditions,

and the appropriate action to take if the conditions are met.
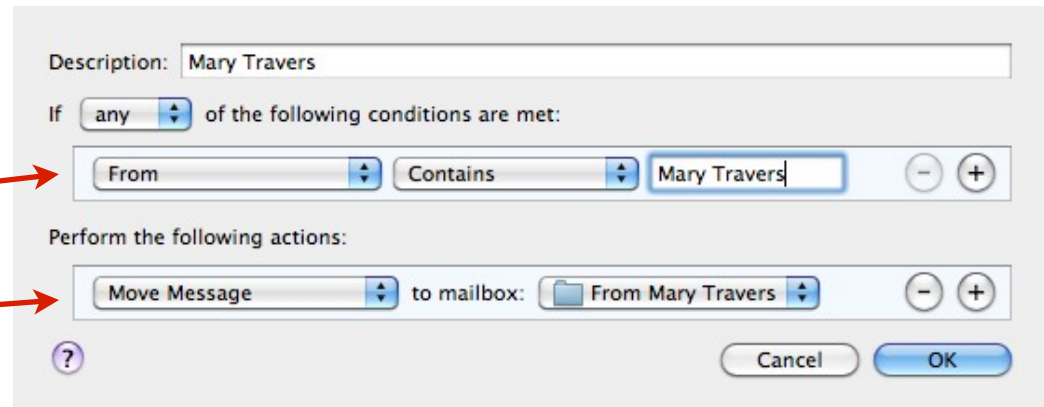
We set up similar new Mailboxes for Peter Yarrow, Paul Stukey, and Woodworking, with appropriate Rules in Preferences.

Now we have our new Mailboxes set up, and let's assume the same messages that were in our simplified Mail inbox on p. 1 are now sent to us.

Here's what we see:

From	Subject
Mary Travers	**Here's the recipe for Slumgullion**

From	Subject
Peter Yarrow	**AshMug handouts**
Peter Yarrow	**Re: Principles of Confabulatory Obfuscation**

📁 From Mary
📁 From Peter
📁 From Paul
📁 Woodworking

From	Subject
Paul Stookey	**Visit at Thanksgiving**
Paul Stookey	**Woodworking club meeting**

From	Subject

And here is what's left in the Inbox.

▶ 📥 Inbox

From	Subject
Paul Simon	**Dinner Saturday night**
Art Garfunkle	**Fw: Plans for the drop-leaf table**
Paul Simon	**Do you have Art's email?**
Art Garfunkle	**Pictures that Paul sent me**

The good news is that (1) the Inbox is considerably de-cluttered, and (2) we can manually drag and drop Art's "Plans for the drop-leaf table" from the Inbox into the Woodworking Mailbox where we wanted it, which wasn't possible when Woodworking was a Smart Mailbox.

The bad news is that the email from Paul about Woodworking isn't in the Woodworking Mailbox. Remember (p. 6) that one of the characteristics of regular Mailboxes is that a message can be in only one of them. In this case, the Rule in Preferences for the From Paul Mailbox was above the Rule for the Woodworking Mailbox, so the first Rule grabbed the message.

How can we fix this problem?

Here are a few possibilities:

- Use Smart Mailboxes for email sent from Paul and any others we expect might also include emails about woodworking.
    This preserves the ability to manually move messages into the Woodworking Mailbox, but doesn't de-clutter the Inbox.

- Manually Copy and Paste: Select the woodworking message in the From Paul Mailbox, Copy it, and Paste it in the Woodworking Mailbox.
    This adds a little to the clutter, since there are now 2 copies of this woodworking message.

- Change the Woodworking rule to Copy the message to the Woodworking Mailbox rather than Move it, and put it above the other Mailbox Rules.
    This adds a little more to the clutter, since there are now 2 copies of every woodworking message, but you don't have to manually Cut and Paste.
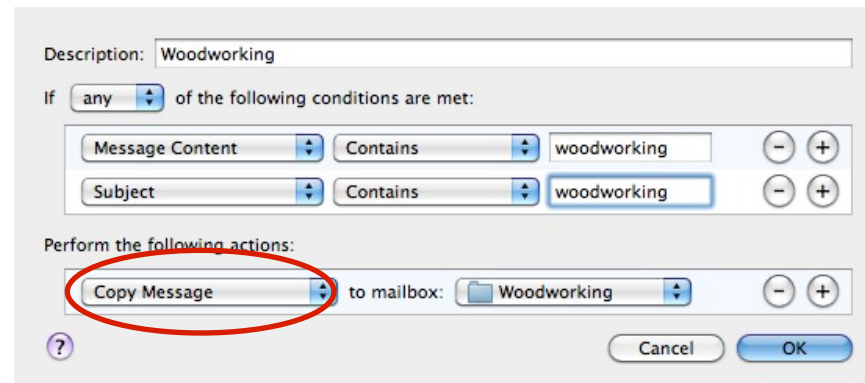
Arranging Mailboxes & Putting Them Within Folders or other Mailboxes

It's easy to rearrange the Mailboxes in the main Mail window sidebar just by clicking on one of them, holding the mouse button down, and dragging it up or down. Release the mouse button when the blue horizontal bar is where you want the Mailbox.

Sometimes, though, you might want to group related Mailboxes together like related files are grouped in a Folder.

You can do this with regular Mailboxes by clicking on one and dragging it up or down until it is on another Mailbox. When you release the mouse button, it becomes a sub-Mailbox within the destination Mailbox. The destination Mailbox will then have the little gray Triangle next to it so you can close or open it to reveal its contents.

You can't do the same thing with Smart Mailboxes, but you can create a Folder (Mailbox/New Smart Mailbox Folder) that holds multiple Smart Mailboxes (but not regular Mailboxes).
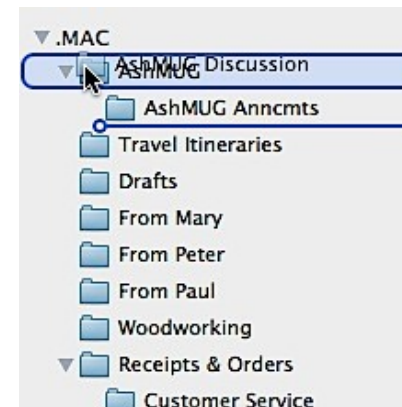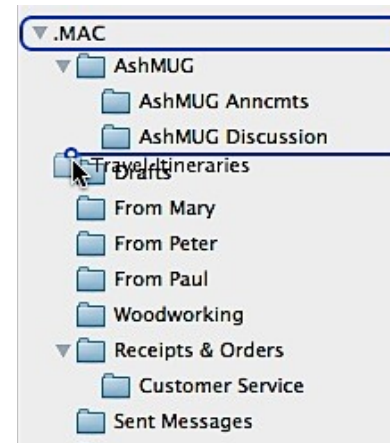
There is an important thing to note about the behavior of Mailboxes within Mailboxes. When you select the enclosing Mailbox, you see only what is in IT, not any of the messages in the Sub-Mailboxes. To see what is in the Sub-Mailboxes, you have to select each one individually. This is annoyingly inconsistent with the behavior of the Inbox, Sent and Trash Mailboxes, where selecting them shows everything in any of the mailboxes within them.

Archiving Old Mail

The ultimate way to de-clutter Mail is to Archive old messages, then delete them. If you then burn the archived mail to a CD or DVD, or Move it to an external hard drive, you can also free up space on your computer's hard drive.

The key here is archiving in a retrievable and preferably easily searchable form, should you ever need any of the information again.

I use an application called MailSteward, which archives both messages and their attachments and has a lot of features that I like. There is a handout on it, *MailSteward for Email Archiving.pdf*, downloadable from the AshMUG website http://www.ashmug.com/Page.asp?NavID=9 . It is a bit dated, (2007) but most of the information is still relevant.

However, there is a very good *free* method of Archiving old email using only functionality built into Apple Mail. This method also archives both messages and their attachments. Basically, it uses the Mailbox/Archive Mailbox Menu item. This command will archive the entire contents of selected single or multiple (Command-click) Mailboxes. However, we will also use some of the properties of Smart Mailboxes to make the archiving a lot easier and more specific.

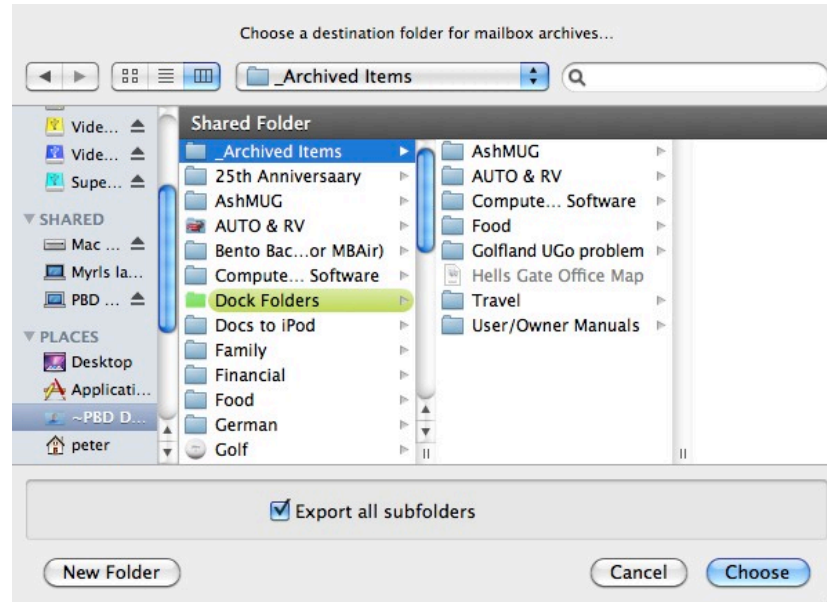The first step is to go to Mailbox/New Smart Mailbox and create a new Smart Mailbox to hold everything we want to archive, using Rules to select which messages we want to include.
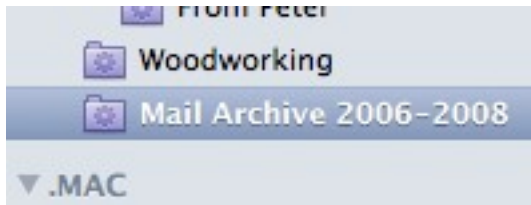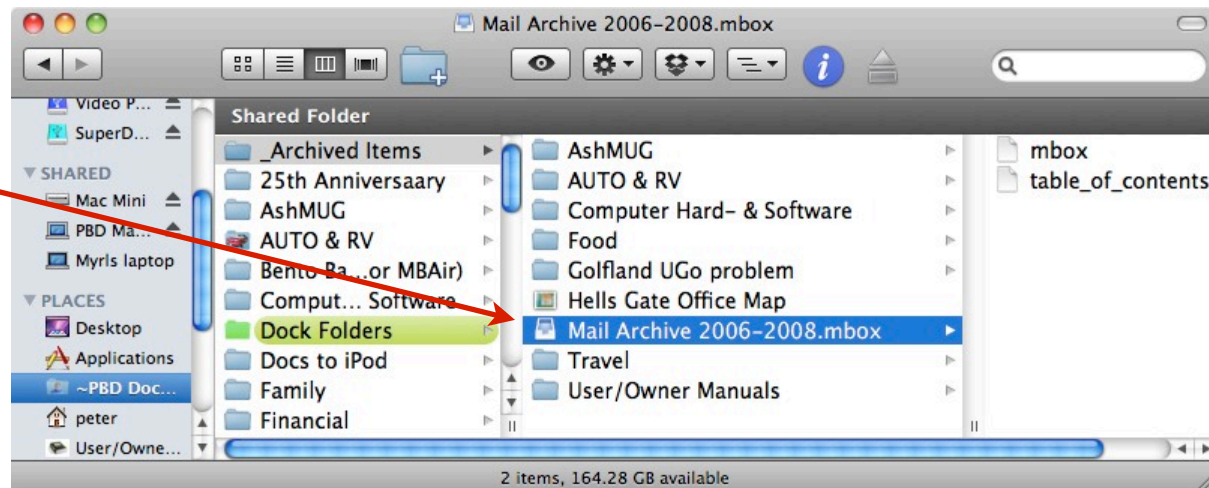
Now we Select this new Smart Mailbox...

...and click on Mailbox/Archive Mailbox. Choose a destination for the file from the pop-up window.

The filename will be *SmartFolderName*.mbox.

If you need to free up space on your internal hard drive, or just want another backup, you can burn this file to a DVD or CD or move it to an external hard drive.

We'll get to how to recover these emails if necessary below, but we are not done de-cluttering yet. Now that we have these emails archived, we need to delete them from the Mail program.

Thanks to the unexpected behavior of Smart Folders with regard to deleting emails (see the yellow warning box on p. 7) we can delete all of them at once.

Do not delete the Smart Folder itself. Open it, click on any email, then Select All (Command-A). Now click the delete symbol in the toolbar at the top of the Mail window, or press the delete key.

Note that, as with any delete operation in Mail, this just moves the emails to the Mail Trash (near the top of the Mail window sidebar). To remove them from the computer, go to Mailbox/Erase Deleted Items.../In All Mailboxes.

Now you can delete the Smart Folder by selecting it and going to Mailbox/Delete Mailbox.

To recover an archived Mailbox:

Go to File/Import Mailboxes and select Apple Mail

Click Continue, and navigate to the location of your archived Mailbox and select it.

The recovered Archive will appear in the Mail sidebar in a folder called Import. You can search it with Mail's search tools just like any other Mailbox.

When you are through recovering what you need, you can delete the Import Folder by selecting it and going to Mailbox/Delete Mailbox.

Appendix
Behavior of Smart Mailbox and Preferences Rules

Here are some important behaviors of Rules that you need to consider when setting them up. Some of them can have unintended consequences.

The criteria in any Rule are always *Case-Insensitive*

When you use Contains, the Rule will consider the criterion met if *any* of the text string(s) appear, even as part of another word. Unfortunately you can not use quotes to make the criterion case sensitive or restrict it to a single word or phrase.

For example, this Rule would match the following subjects:
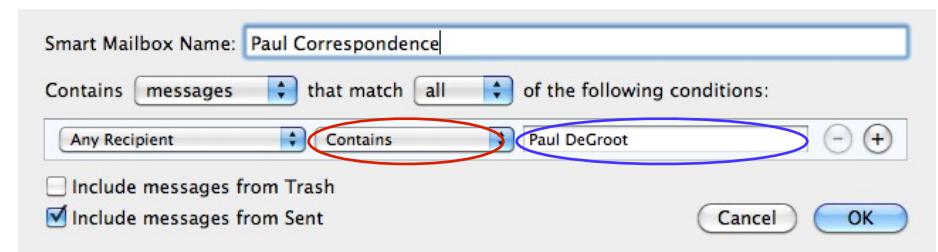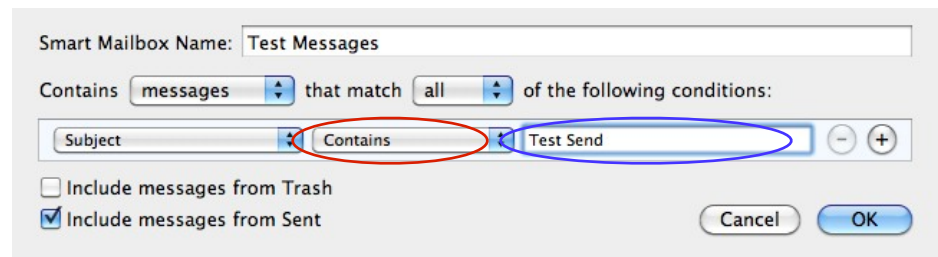
TEST
You have won a contest!
Test send
Dad, please send money
Sending some photos

Another example using Contains: The Rule will consider the criterion met if *Paul* and *DeGroot* appear, even separately, in the list of recipients.
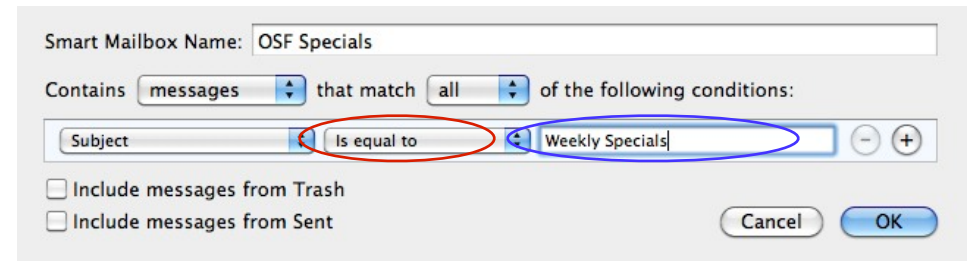
For example, if the recipients of a message included Paul Collins George Goebel and Peter DeGroot, this would be a match.

One way around this problem is to use the actual email address, e.g. pdegoot@fakeisp.com

When you use Is equal to, the the Rule will consider the criterion met only if the *exact* test string, no more or no less, is present. (It is still Case-Insensitive, though.)

One place Is equal to doesn't work is with Any Recipients. The criterion is not matched, even if you copy and paste the exact address from a message. You have to use Contains with Any Recipients.

Smart Mailbox Name: OSF Specials

Contains messages that match all of the following conditions:

Subject | Is equal to | Weekly Specials

☐ Include messages from Trash
☐ Include messages from Sent

Cancel   OK

There are some major differences between the available Rules for Smart Mailboxes and the Rules in Preferences.

Entire Message
From
✓ Any Recipient
Subject

Date Received
Date Last Viewed

Sender is member of Group

Message is Flagged
Message is Unread
Priority is Low
Priority is Normal
Priority is High

Message was Replied to
Message was not Replied to

Message is in Mailbox
Message is not in Mailbox

Contains Attachments
Any Attachment Name

Message Type

Message has To Do's

Unique to Smart Mailboxes

Unique to Rules in Preferences

From
To
Cc
✓ Subject

Any Recipient

Message is addressed to my Full Name
Message is not addressed to my Full Name

Date Sent
Date Received

Account

Sender is in my Address Book
Sender is not in my Address Book
Sender is in my Previous Recipients
Sender is not in my Previous Recipients
Sender is member of Group
Sender is not a member of Group

Message Content
Message is Junk Mail
Message is Signed
Message is Encrypted
Priority is High
Priority is Normal
Priority is Low

Any Attachment Name

Message Type
Every Message

Edit Header List...

Rule order is important (Rules in Preferences)

•Rules in Preferences are applied only to messages coming into the Inbox, and in order from top to bottom, so if a Rule moves a message out of the Inbox, it will never get to the Rules below it.

•You can change the position of a Rule by dragging it up or down.

•You can deactivate a rule without removing it by unchecking it
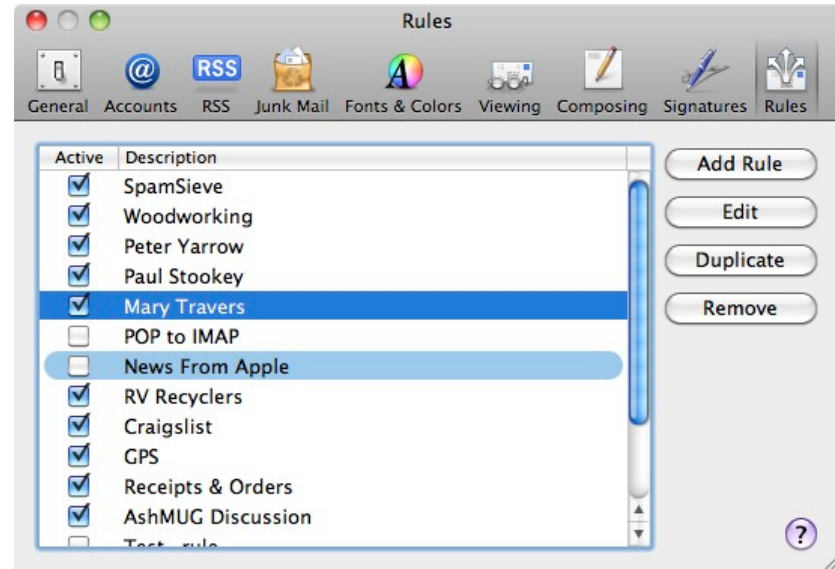
Shortcut for Rule Creation (Both Smart Mailbox and Preference Rules)

If you select a mail message that is typical of the ones for which you want to create a rule, the criteria will be the values from that message by default. This can save you some typing and reduces the chance of making a mistake.