

How to file messages older than 1 day into subfolders by date

This rule will scan your inbox once per hour (or per your specific schedule) and file messages that are older than one day to a message folder and automatically create subfolders organized by Year-Month.

Start by creating a new rule of type: Scan messages after a period of time in a folder

Then choose your inbox as the **Source Folder**, and select 1 day in the **Older Than** dropdown:

The screenshot shows the 'Auto-Mate Rule Properties' dialog box. The 'Rule Name' field contains 'File Messages Older than one day'. The 'Rule Type' dropdown is set to 'Scan messages after a period of time in a folder'. The 'Source Folder' field contains '\Pergenex Support\Inbox'. The 'Older Than' dropdown is set to '1 day'. The 'Newer Than' dropdown is set to 'Any Age'. The 'Rule Category' field contains 'Housekeeping'. The 'Quick Run (List rule in Toolbar/Ribbon Run list)' and 'Enable Rule' checkboxes are checked. The 'Add Rule' button is highlighted.

Next, on the Conditions tab, select **Status** = Read:

Auto-Mate Rule Properties

Rule Name: File Messages Older than one day

←

→

Basics

Addresses

Conditions

Advanced

Actions

Exceptions

Scheduling

☒ Match all properties (AND)

☐ Match any property (OR)

Match Type

Subject: AllEnter words or phrases separated by spaces

Body: AllEnter words or phrases separated by spaces

Header: AllEnter words or phrases separated by spaces

Category: AllEnter categories separated by semicolons

Status: Read

Importance: Any

Flag: Don't Care

Only Items: All Items

Attachments: Ignore

☐ Exact match

☐ Ignore case

☐ Message Size

At Least: 0kilobytes

At Most: 0kilobytes

Make Template

Add Rule

Apply

Test Rule

Close

Then on the Actions tab, check Move To and select the root folder to file your messages. To then create the subfolders automatically, click the Move To action options button shown by the arrow below:

2 / 5

Auto-Mate Rule Properties X

Rule Name:
⬅ ➡

Basics
 Addresses
 Conditions
 Advanced
Actions
 Exceptions
 Scheduling

Perform the following actions in sequence from top to bottom

☐ Status

Set to Unread

☐ Importance

Set to Normal

☐ Flag Status

Mark Complete

✓

☐ Categories

Add Only

...

☐ Subject

<SUBJECT>

...

☐ Forward

✓

✕

📁

✓

☐ Reply

To Sender

choose a reply template

✓

☐ Export As

Text(.TXT)

...

✓

☐ Attachments

Detach/Save

...

✓

☐ Print

✓

☐ Open Message

✓

☐ Create Task

✓

☐ Copy To

...

✓

☒ Move To

\Pergenex Support\Old Mail

...

✓

☐ Delete

Delete - move to Deleted Items folder

✓

Make Template

Add Rule

Apply

Test Rule

Close

On the Folder Options dialog window check: ***Automatically create a new folder below this level***

Then in the dropdown choose Received month year (or another date time format):

3 / 5

Folder Options

Folder Create Options

Control whether folders are automatically created based on message properties

☒ Automatically create a new folder below this level

Naming Format

Select any combination of these fields that are extracted from the message acted upon:

Received month year

Separate fields with:

☒ none ☐ space ☐ dash ☐ underscore

Preview:

[-] Old Mail

[-] Jan 2010

OK

Cancel

Finally, you can adjust when and/or how often this rule runs on the scheduling tab:

Auto-Mate Rule Properties

Rule Name: File Messages Older than one day

←

→

Basics

Addresses

Conditions

Advanced

Actions

Exceptions

Scheduling

☐ Automatic - based on events

☒ Once every

1 hour

☐ On this day and time:

Every Day

:

:

☐ Manually Only - from Quick Run list

Limit Execution Time

☐ Only run this rule during the following times:

All

None

M-F

☐ Mon
 ☐ Tue
 ☐ Wed
 ☐ Thu
 ☐ Fri
 ☐ Sat
 ☐ Sun

From: 10:04:24 AM
 To: 10:04:24 AM

Make Template

Update Rule

Apply

Test Rule

Close

That's it!

Some frequently used variations with this type of rule are to further qualify the conditions to match a flag setting or category to prevent certain messages from automatically getting moved. For example, you can set the rule to NOT move messages with a flag set.

Article ID: 49

Last updated: 23 Mar, 2015

Revision: 1

Auto-Mate v8.0 -> How to's -> How to file messages older than 1 day into subfolders by date

<http://www.pergenex.com/kb/index.php?View=entry&EntryID=49>