



Part of the **tech4me2** series



EMAILS MADE SIMPLE **WORKBOOK**



Practical exercises to clean out, organize, and
protect your inbox step by step



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HOW TO USE THIS WORKBOOK

This workbook is designed to be used alongside the [Emails Made Simple](#) course.

The purpose of this workbook is not to duplicate the content of the course. Rather, it is intended to guide you through actually implementing the concepts covered in the course. This workbook is largely exercised-based.

I recommend that you complete each section immediately after finishing the corresponding module in the course, to avoid backtracking and duplicating effort. If you do this, once you finish the course you'll have a tidy inbox, know where everything resides, and have filters handling lots of routine activities for you.

Section 1 – Where Your Inbox Stands Today

 Watch Video 1 first

Before moving forward, let's get a snapshot of your inbox as it is today.

 Exercise:

Total inbox messages: _____

Unread messages: _____

Spam messages: _____

Most common types of email: _____

Oldest email is from: _____ (month, year, century)

 Reflection:

What concerns you most about your inbox today?

What would you like to see when you open your email?

Section 2 – Stop the Flood

Watch Video 2

Before beginning the big inbox cleanup, it helps to slow the number of new messages arriving each day.

Most inbox overload doesn't come from personal messages. It usually comes from:

- newsletters
- promotions
- automated account notifications

None of these messages are harmful individually, but collectively they add up.

Gmail provides several simple tools that allow you to safely reduce the flow.

Exercise 1 – Identify Frequent Senders

List senders that appear often in your inbox. Some of these are probably good candidates for unsubscribing.

1.

 2.

 3.

 4.

 5.

-

Exercise 2 – Safe Unsubscribing

When dealing with legitimate newsletters or promotions:

1. Open the email
2. Look for **Unsubscribe** near the sender name or at the bottom of the message
3. Confirm the unsubscribe request

Tip: Gmail sometimes shows its own **Unsubscribe link near the sender name**, which is usually the safest option.

Exercise 3 – When NOT to Unsubscribe

Sometimes it is better **not to click unsubscribe** if the email looks suspicious. Warning signs include:

- ☐ You do not recognize the sender
- ☐ The email feels urgent or threatening
- ☐ The email asks for personal information
- ☐ The message looks suspicious or poorly written

You'll learn about malicious emails in Module 6. But for now, if you see any of these signs, simply delete the message or use Gmail's **Report Spam** option instead.

Exercise 4 – Blocking Persistent Senders

Occasionally a sender continues sending messages even after you unsubscribe. If this happens:

1. Open the message
2. Click the **three-dot menu** at the upper right
3. Select **Block sender**

List any senders you may want to block:

Daily Habit

When a new email arrives, ask yourself if it is truly important. What will you do with the information? Will it affect your decision-making in any way?

If not, unsubscribe or block the sender.

Section 3 – The Big Purge

Watch Video 3

In Module 2, you stopped the flood of new messages. Now it's time to deal with what's already sitting in your inbox.

This section will help you:

- ✓ Quickly reduce a large backlog of emails
- ✓ Work in manageable batches (not overwhelm)
- ✓ Make smart decisions about what to delete, keep, or review
- ✓ Build momentum with visible progress

Before we begin, know that it's normal to feel a little hesitant, maybe even apprehensive, before deleting emails. But you can relax if you understand that:

- ✓ Deleted emails go to Trash, not gone forever
- ✓ Gmail keeps them for 30 days before permanent deletion
- ✓ You can always archive instead of deleting if unsure

We're going to do this safely and methodically. You've got this.

Step 1: Start With the Oldest Messages

We're going to begin by deleting the oldest emails first. That may seem counterintuitive, but it is more effective than beginning with the most recent messages.

Why is that? Because older emails are generally no longer relevant. This means that you can delete them without having to stop and make decisions. Because of this, you can quickly get a rhythm, a momentum going, which is exactly what you want.

So, the first thing to do is sort your inbox front to back. Do this:

- ☐ Look at the top right of your inbox
- ☐ Click the email count
- ☐ Change sorting to Oldest

Quick Reflection:

Did you see emails you didn't even know were still there? Any from the 20th century?

Step 2: Delete in Batches (Your First Win)

Now that you're looking at old emails, it's time to pull the trigger. But before you do, note the number of emails in your inbox and record it in the exercise below.

- ☐ Click the checkbox at the top left
- ☐ Select visible emails (if this message shows; if not, just continue)
- ☐ Click the Trash icon

Feel free to repeat this process until you reach recent emails. Stop before exceeding your comfort level.

Exercise: Track Your Progress

Starting inbox count: _____

Emails deleted: _____

New inbox count: _____

Step 3: Use Search to Work Smarter

Now that you're warmed up, let's try selecting emails for deletion according to various criteria.

- ☐ Click the "hamburger" icon on the right of the Gmail search field.
- ☐ Enter a search criterion (see examples below) and press ENTER.
- ☐ All emails matching your search criterion will display.
- ☐ Delete or archive them.

Here's what the search/selection screen looks like:

From hello@recommendedreads.com

To _____

Subject _____

Has the words _____

Doesn't have _____

Size greater than _____ MB _____

Date within 1 day _____

Search All Mail _____

☐ Has attachment ☐ Don't include chats

Create filter [Search](#)

Try These Searches:

before:2022/01/01

from:example@company.com

has:attachment larger:10M

category:promotions

Exercise:

Search criteria used: _____

Emails found: _____

Action chosen: Delete / Archive / Review Later

Step 4: Clear Trash and Spam

☐ Open Trash → Delete forever

☐ Open Spam → Delete all

Step 5: Build Momentum

While building momentum is important, recognize that you likely won't be able to complete The Big Purge at one sitting, and that's fine. But hopefully you've made some genuine progress. Enter your stats below.

Emails removed: _____

Time spent: _____

Next target: _____

Key Takeaways:

- ✓ Start with oldest
- ✓ Work in batches
- ✓ Use search to create those batches
- ✓ Archive if unsure
- ✓ Progress over perfection

💡 Reflection:

How do you feel post-purge?

What surprised you during the cleanup?

Section 4 – Sorting and Automations

Watch Video 4

There is a very good chance that you’ve never used the automation functionality within Gmail, which is unfortunate, because automation rules can save you a great deal of time. The more emails you typically receive in a week, the more automation can help you.

While automation rules can be very powerful, they are surprisingly easy to set up, even for the technologically challenged. The setup process is only two steps:

1. In the search window, identify incoming emails by some criterion (just as you did in Section 3). Most often the criterion will be the sender. But this time, instead of pressing the Search button, you press the Create Filter button.
2. In a second window, you tell Gmail what to do with incoming emails meeting your search criteria. This could be to simply assign a label, or to star the messages if the sender is your boss, or any of several options. All you have to do is make selections from the list presented.

Exercise: My Core Labels

Let’s begin by creating a few labels that we will use to select and tag emails. You may already have created some. Labels might be things like “boss”, “church”, “bills to pay”, “read later”. You can always add or delete labels later. I suggest keeping label names concise.

1 _____

2 _____

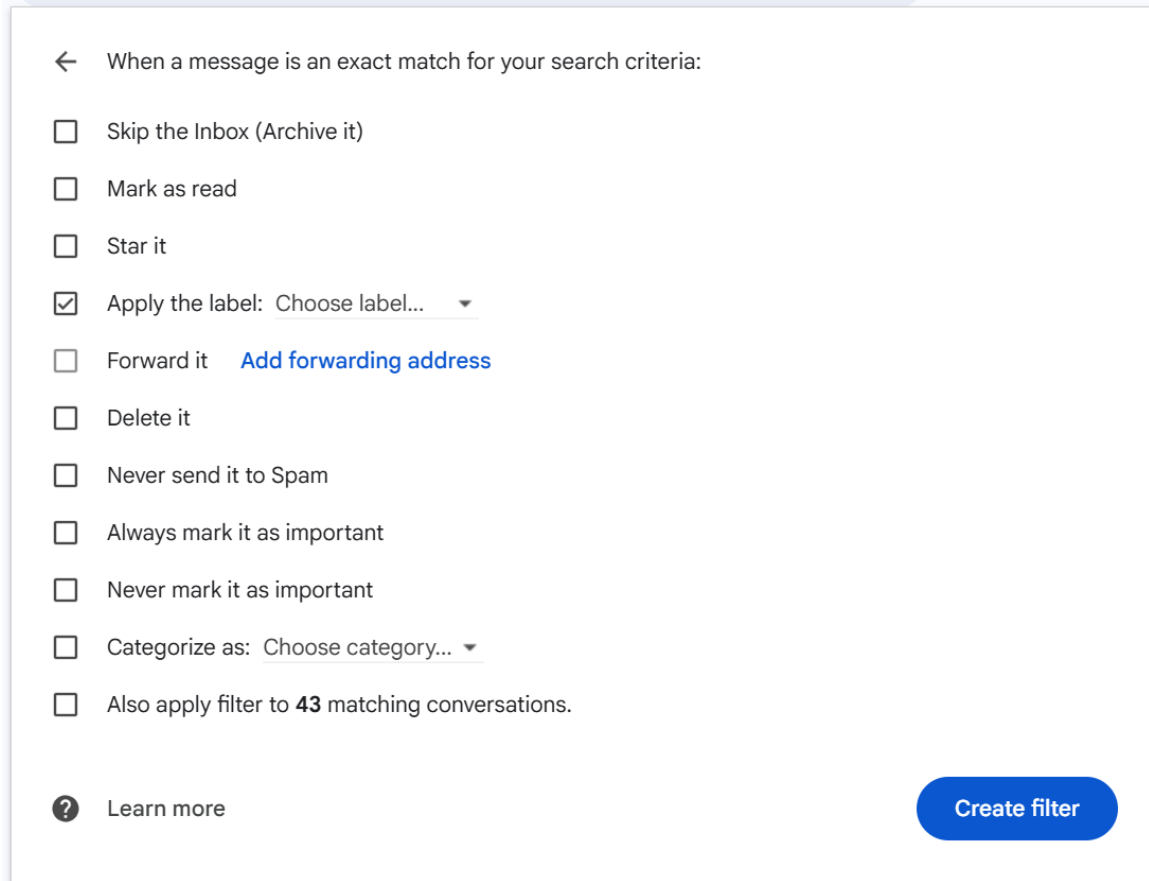
3 _____

4 _____

5 _____

Next, we tell Gmail what to do with emails meeting our search criteria. Most often this will involve assigning a label to them, but it might also involve doing something else.

For example, checking “Skip inbox” sends the email directly to All Mail, bypassing your inbox altogether. This could be handy for less important emails that you might want to search for later.



The screenshot shows the Gmail 'Create filter' dialog box. At the top, it says '← When a message is an exact match for your search criteria:'. Below this is a list of actions with checkboxes: 'Skip the Inbox (Archive it)', 'Mark as read', 'Star it', 'Apply the label: Choose label...' (which is checked), 'Forward it' (with a link 'Add forwarding address'), 'Delete it', 'Never send it to Spam', 'Always mark it as important', 'Never mark it as important', 'Categorize as: Choose category...', and 'Also apply filter to 43 matching conversations.' At the bottom left is a link 'Learn more' with a question mark icon. At the bottom right is a blue button labeled 'Create filter'.

That was surprisingly simple, wasn't it? You're going to set up a couple of automation rules yourself. But before you enter the search criterion, take just a moment to write down what you would like your automation to do. This is especially important if you plan to select more than one to-do action for a single filter result, or if you plan to create more than one automation for a single filter. Basically, you don't want to create automations which might conflict with each other. But keep things simple and you'll be just fine.

So here we go. Map out an automation or two below.

 Exercise: Filter Blueprint

If sender contains _____ → Apply label _____

If subject contains _____ → Skip inbox

If sender contains _____ → Mark as read

Look over your list, and if you don't see any conflicts, hop into your inbox and set up your first filter and automation rule.

You're in the Big Leagues now!

Section 5 – Using More than One Email Address

Watch Video 5: Using More than One Email Address

You may have more than one email address, such as:

- a personal Gmail account
- a work email address
- an older email account you still check occasionally

Instead of checking several inboxes, Gmail allows you to **bring other email accounts into one place**. This can make email much easier to manage.

However, consolidation is a personal choice. You may prefer to keep accounts separate.

This section helps you decide **whether consolidation makes sense for you**, and if so, how you want to set it up.

Exercise 1 – My Current Email Accounts

List the email accounts you currently use.

1.

2.

3.

4.

Which account do you check most often?

Exercise 2 – Should I Consolidate My Email?

Combining email accounts into Gmail can make things simpler, but it is not always necessary.

Possible benefits:

- fewer inboxes to check
- fewer missed messages
- easier daily routine

Possible drawbacks:

- some people prefer to keep work and personal email separate
- forwarding may occasionally delay a message slightly

Based on this lesson, my decision is:

- ☐ I would like to bring other email into Gmail
- ☐ I prefer to keep my accounts separate
- ☐ I may experiment with forwarding one account

Notes or thoughts:

Exercise 3 – Accounts I May Forward into Gmail

If you decide to consolidate, you can set your other email accounts to forward messages into Gmail.

This is done within the original email account (the one you're forwarding *from*), not in Gmail. The exact steps vary by provider, so look for "forwarding" in that account's settings.

Note: Gmail used to collect messages using a method called POP, but forwarding is now the simpler and more reliable option.

Accounts I may forward into Gmail:

1.

2.

Have I enabled forwarding?

- ☐ Yes
 - ☐ Not yet
 - ☐ I decided not to consolidate
-

Exercise 4 – Replying From Another Email Address

Even if you receive forwarded messages in Gmail, you may want your replies to appear to come from the original email address.

Example:

You receive a message sent to your work email but reply from your personal Gmail inbox. The return message can still appear to come from your work address.

Do I want to use the “**Send Mail As**” feature?

If so, you can set this up in Gmail under **Settings → Accounts and Import → Send mail as**. Gmail will guide you through adding and verifying the address.

- ☐ Yes
- ☐ No
- ☐ Not sure yet

If yes, which email address would I use?

Exercise 5 – My Email Notification Plan

Email can easily interrupt your day more often than necessary.

Instead of checking email constantly, many people find it helpful to check messages **at specific times**.

How often would I like to check email?

Morning: _____

Afternoon: _____

Evening: _____

Notifications I plan to leave ON:

Notifications I plan to turn OFF:

My Plan Going Forward

After this section, my approach to email will be:

- ☐ Use Gmail as my main inbox
- ☐ Forward one additional account into Gmail
- ☐ Keep my email accounts separate
- ☐ Adjust notifications so email interrupts me less often

Notes:

Section 6 – Email Safety Basics

Watch Video 6

The principle online threat today is phishing emails, so it's important to understand what they are. In your own words, what is the goal of a phishing email? (Hint: What is the sender trying to get you to do?)

While there are many types of phishing emails, most have “tells”.

 Exercise: List three indications that a message might be a phishing email.

1

2

3

If you believe that a message is a phishing email, what are some steps that you could take?

- ☐ First, do NOT click any button or any link in the email, including an Unsubscribe link.
- ☐ Delete the email, or
- ☐ Report it to Gmail by clicking the Spam button.
- ☐ For serious or repeated instances, report the offender at [ic3.gov](https://www.ic3.gov).

Included with this course is a [Phishing Emails Quick Reference Guide](#) which provides examples of six of the most common types of phishing emails.

1 Section 7 – Your Daily and Weekly Inbox Maintenance Plan

If you've been doing the exercises as you progressed through the course, your email inbox should be much tidier and tamer than it was before. But...will it stay that way?

It can, and it doesn't take much effort. Ten or fifteen minutes each week is enough, if you are consistent.

But habits—even good ones—can be difficult to establish. To help you keep your inbox as tidy as it is today, I've provided a checklist of short, easy tasks for you to do each week. [Click here](#) to download your copy.

I strongly suggest that you choose a time to perform maintenance, perhaps Friday afternoons, and set up a recurring event in your calendar. Why not take a minute to do that right now?

Reminder: A manageable inbox comes from simple habits used consistently.

 Self-Assessment

It is my sincere hope that you have found this course truly helpful. If you implement what you've learned, and maintain good habits, you'll have a much better relationship with your inbox.

Take a moment to review the following statement and answer them honestly.

- ☐ I can control my inbox
- ☐ I understand labels
- ☐ I understand filters and automation rules
- ☐ I know how to recognize phishing attempts
- ☐ I have a weekly maintenance routine

Final Page – Quick Reference Guide

Weekly:

- Archive emails
- Unsubscribe from unwanted newsletters
- Review spam

Monthly:

- Review filters
- Check security settings

Reminder: A manageable inbox comes from simple habits used consistently.