OUTLOOK – RULES

Updated 12/20/11

SETTING UP RULES TO DIRECT EMAIL TO FOLDERS

This is a simple rule that will automatically direct email to a specific Outlook folder.

- 1. Create the subfolder you want the email to go to. This can be a subfolder in your Inbox or in your Personal Folder.
 - a. To create the folder, right click on your Inbox or Personal Folder and select New Folder.



b. Type in the new folder name and select the folder you want it to be listed under.

(The example below will insert the new subfolder under Inbox)

Create New Folder	×
Name:	
Eolder contains:	
Mail and Post Items	/
Select where to place the folder:	
Mailbox - Katie Butler Mailbox - Katie Butler Mailbox Drafts [1] Sent Items Deleted Items Calendar Calendar Contacts Journal Journal Notes Outbox	
OK Cancel	

2. Now we'll create the Rule. Select the File tab, and click Rules and Alerts...



a. Click the New Rule ... button

Rules and Alerts	X
E-mail Rules Manage Alerts	
💁 New Rule Change Rule + 🖹 Copy 🗙 Delete 🛛 🔺 💌 Rules Now Options	
Rule (applied in the order shown) Actions	A.
Clear categories on mail (recommended)	×.
	~
Rule description (click an underlined value to edit):	
Apply this rule after the message arrives	
assigned to any category clear message's categories	
Lighable rules on all messages downloaded from K55 Feeds	
OK Cancel	Apply

b. Under Step 1, select "Move messages from someone to a folder". Click Next.



- c. Under Step 1, "from people or public group" should already be checked for you.
- d. Under Step 2, click on "people or public group".

Rules Wizard	×
Which condition(s) do you want to check? Step 1: Select <u>c</u> ondition(s)	
 ✓ from people or public group with specific words in the subject through the specified account sent only to me where my name is in the To box marked as importance marked as sensitivity flagged for action where my name is in the To box where my name is in the To box where my name is in the To box where my name is in the To o Cc box where my name is in the To o box sent to people or public group with specific words in the body with specific words in the message header with specific words in the subject or body with specific words in the snoter's address with specific words in the sender's address assigned to category category 	
Step 2: Edit the rule description (click an underlined value) Apply this rule after the message arrives from[people or public group] move it to the specified folder and stop processing more rules	
Cancel < Back Next > Fin	ish

e. Type the email address of the person in the "From" space (ie:debbi.smith@gmail.com) or select the name from the list. Click "OK".

Rule Address		
Search: 💿 Name only 🔿 More columns	A <u>d</u> dress Book	
Go	Global Address List - Microsoft Exchange	 Advanced Find
Name Title	Business Phone	Location
Se Anna Merril (Michelle) OJim Bob ICuyamaca BOT Icrossmont BOT ZGrossmont BOT SGrossmont BOT Aamer Moshi (Khoshaba) Aaron Alpert (Nathan) Aaron Alpert (Nathan) Aaron Alva(Raymond) Aaron Anderson (Daniel) Aaron Anderson (Daniel) Aaron Anderson (Daniel) Aaron Anderson (Daniel) Aaron Angen (Alfonso) Aaron Banana (Matthewi)		
Erom ->		
	OK	Cancel

f. The name will be added to Step 2. Click Next.

Rules Wizard	×
Which condition(s) do you want to check? Step 1: Select <u>c</u> ondition(s)	
✓ from people or public group	
with <u>specific words</u> in the subject	
L through the <u>specified</u> account	
usent only to me	
marked as sensitivity	
flagged for action	
where my name is in the Cc box	
where my name is in the To or Cc box	
where my name is not in the To box	
sent to people or public group	
with <u>specific words</u> in the body	
with specific words in the message beader	
with specific words in the recipient's address	
with specific words in the sender's address	
assigned to <u>category</u> category	
Step 2: Edit the rule description (click an underlined value)	
Apply this rule after the message arrives	
from Debbi Smith	
move it to the <u>specified</u> folder	
and scop processing more rules	
Cancel < <u>B</u> ack <u>N</u> ext > Finish	

g. Under Step 1, "move it to the specified folder'" should already be checked for you. Under Step 2, click on "specified".

Rules Wizard	×
Rules Wizard What do you want to do with the message? Step 1: Select action(s) Image: Select action of the specified folder assign it to the category category delete it permanently delete it forward it to people or public group of roward it to people or public group of roward it to people or public group erdirect it to people or public group	X
Induct to explore or poly using a specific message In a pressage for follow up at this time In ag message for follow up at this time In ag message for the destage In ag message In ag message	
Step 2: Edit the rule description (click an underlined value) Apply this rule after the message arrives from Debbi Smith move it to the <u>specified</u> folder and stop processing more rules	
Cancel < Back Next > Finish	

h. Click on the folder you want the email to be sent to. If the subfolder name does not show, click on the + sign to expand the folder. Click "OK", then click "Next".



i. The folder will be added to Step 2. Click "Next".



j. You won't need to check anything in the Exceptions screen. Click "Next".

	Rules Wizard	×
1	Are there any exceptions? Step 1: Select exception(s) (if necessary)	
e F (r		
r ni d	except if sent to <u>people or public group</u> except if the body contains <u>specific words</u> except if the subject or body contains <u>specific words</u> except if the message header contains <u>specific words</u> except with <u>specific words</u> in the recipient's address except with <u>specific words</u> in the sender's address except if assigned to <u>category</u> category	
m	Step 2: Edit the rule description (click an underlined value) Apply this rule after the message arrives from <u>Debi Smith</u> move it to the <u>New Folder</u> folder and stop processing more rules	
-	Cancel < <u>B</u> ack <u>N</u> ext > Finish	

k. In Step 1, type a name for the Rule. Under Step 2, you can select either or both of the following options: Run this rule now on messages already in "Inbox" (will apply to current messages) Turn on the rule (will apply to any new messages). Click "Finish".

Rules Wizard	×
Finish rule setup.	
Step 1: Specify a <u>n</u> ame for this rule	
Debbi Smith	
Step 2: Setup rule options	
Run this rule now on messages already in "Inbox"	
✓ <u>T</u> urn on this rule	
Create this rule on all accounts	
Apply this rule after the message arrives	
from <u>Debbi Smith</u> move it to the New Folder folder	
and stop processing more rules	
L	
Cancel < Back Next >	Finish