

Creating Rules in Outlook 2007

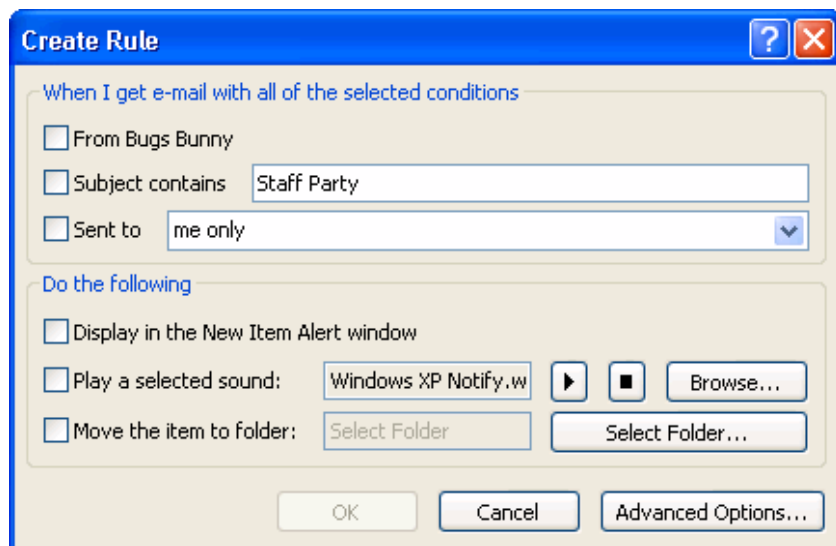
If you want to move your messages from the Inbox to certain folders, assign categories, or perform other actions on an email, you can set up rules so the action will be performed automatically. You can set up rules to be used for long-term organization or just to get your Inbox cleared of the imported emails from Gmail.

Use the Rules & Alerts Wizard to create these automatic actions.

You can get to the wizard in one of a few ways:

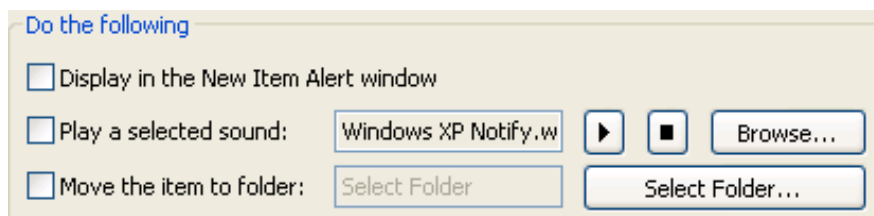
- Click the Create Rule (📧) button on the Standard toolbar
- Right-click an e-mail and click Create Rule
- Click the Tools menu and click Rules and Alerts

With either of the first two choices listed above, you will see this dialog:

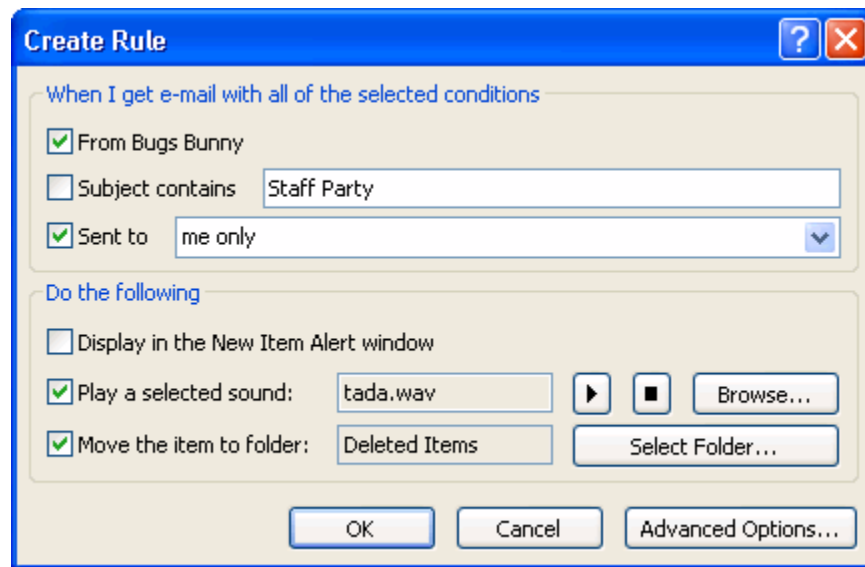


The first part of the box (“When I get e-mail with all of the selected conditions”) specifies when the rule will act; the second part (“Do the following”) specifies what will happen when the type of e-mail you’ve specified arrives. At least one of the boxes in each section needs to be checked for the OK button at the bottom to light up.

The second set of boxes tells Outlook what actions to take when the conditions in the first set of boxes are met:

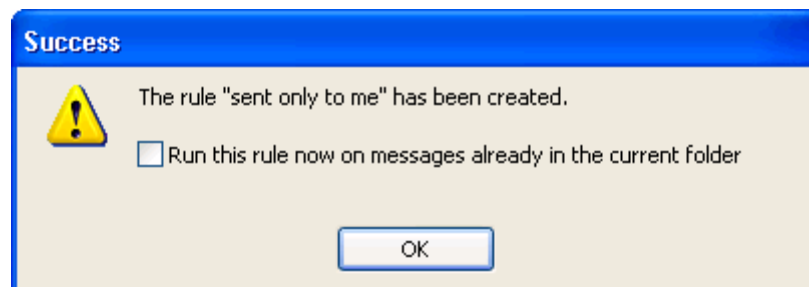


Here is a completed Create Rule box.



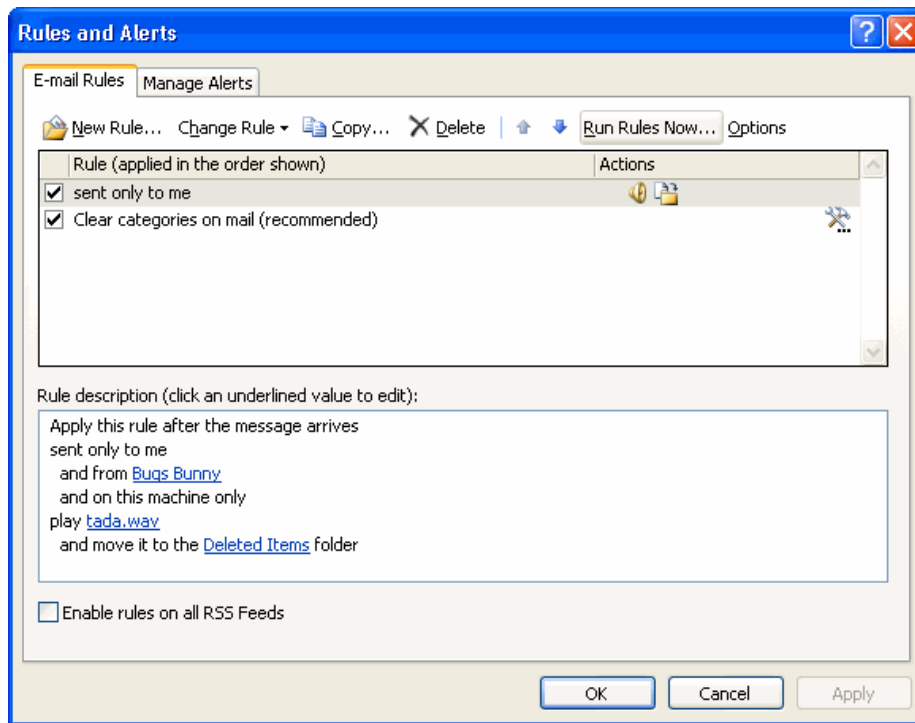
This rule will tell Outlook that when an e-mail arrives from Bugs Bunny, and was sent to me only, Outlook should play the tada.wav sound, and move the e-mail to the Deleted Items folder.

Once we click OK to this box, Outlook will bring up another box confirming that the rule has been created. You'll also have an option to run the rule on messages already in the folder, which will help if you've created the rule after a lot of e-mail has arrived.

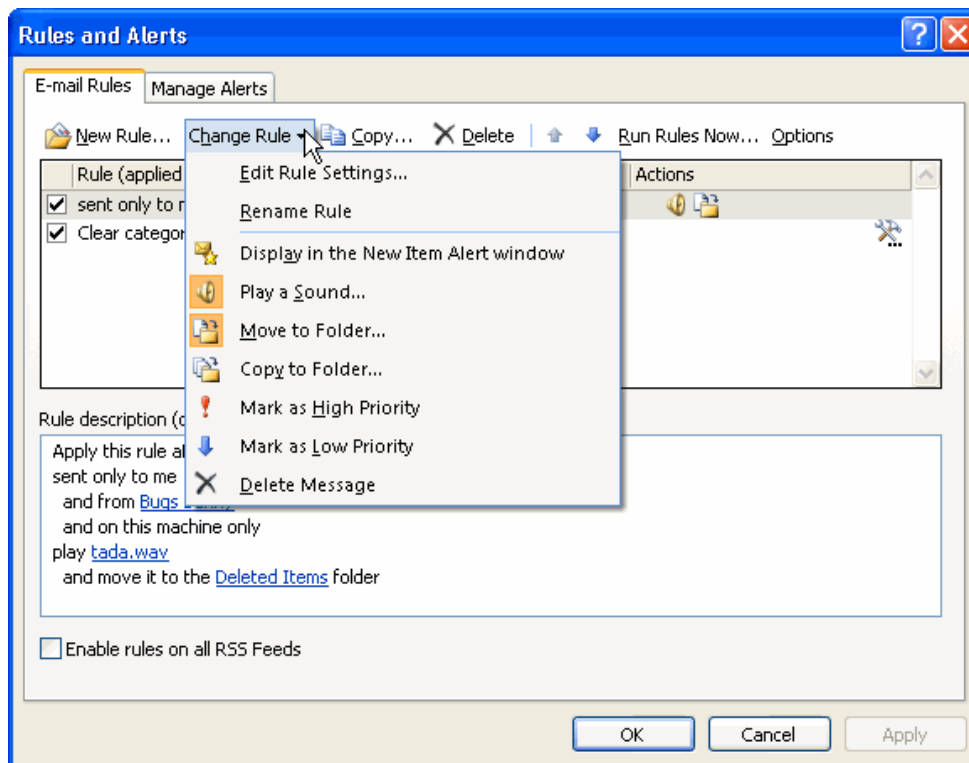


If you click the Advanced Options button in the above figure, you'll get a totally different screen: step 2 of the Rules and Alerts wizard.

Let's look at the Rules and Alerts wizard from the beginning. To launch it, just click the Tools menu and click Rules and Alerts, or click the Rules and Alerts button (🏠) on the Advanced toolbar.

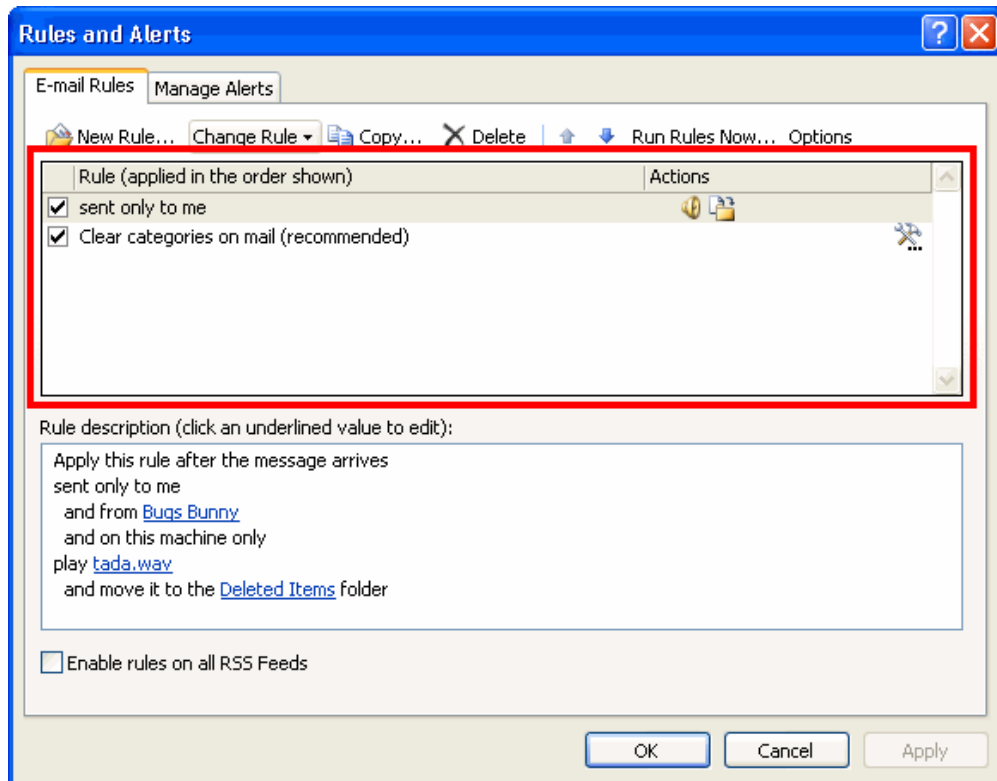


The toolbar at the top of the dialog gives you options to create a new rule; to change, delete, copy, or move the selected rule; or to run the rule now. The Options button allows you to import, export, or upgrade your rules. If you're just looking to make a quick change to a rule's action, the Change Rule button is the best way to do it.



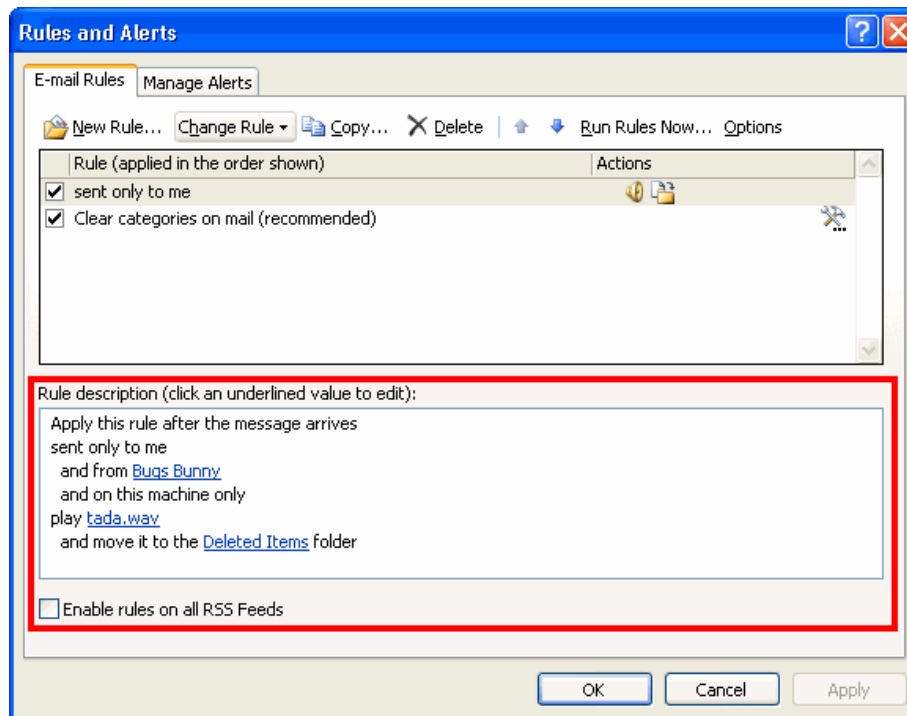
All of the options in the menu are pretty self-explanatory: you can rename the rule or add different options. You'll notice that there are some new options that we didn't have in the Create Rule dialog box, like changing the message's priority. The options that are already in use for the rule are highlighted with an orange icon (for example, Play a Sound and Move to Folder in the sample menu above). You can click those options to remove that action for the rule.

The icons you see in the menu are important when we're looking at part 2 of the Rules and Alerts box.



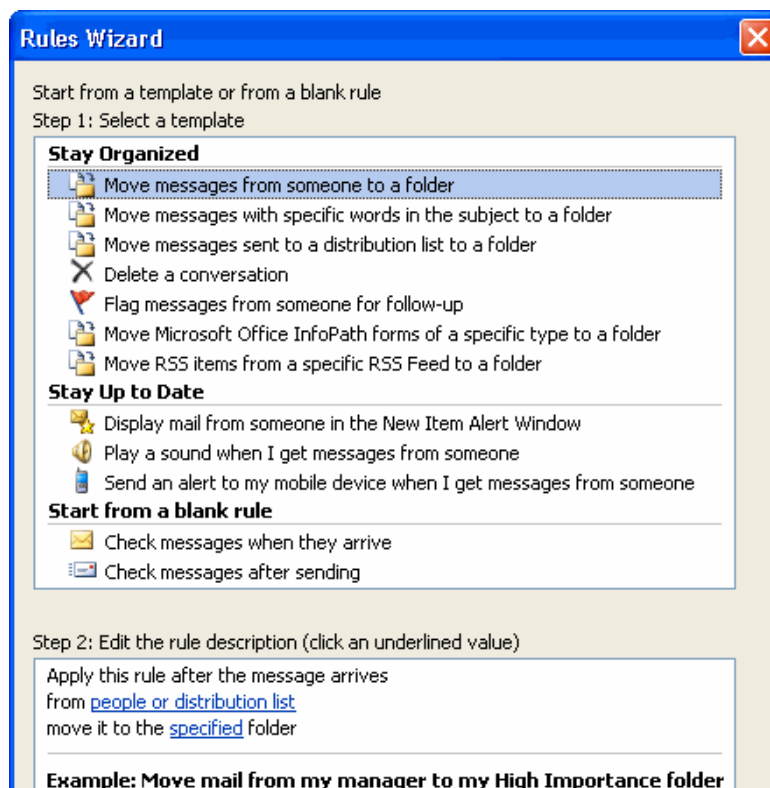
This section is a list of the rules that are in place and the actions that Outlook will take. The actions are identified by the same icons that we saw in the Change Rule menu. In the list, there's also a checkbox by the name of each rule. If the box is checked, the rule is on; if the box is unchecked the rule is off. You can click in the checkbox to change this on/off status.

Part 3 of the Rules and Alerts screen will give you a detailed explanation of each rule that is set up.



You can click the parts that are underlined in blue to change that action or value.








To create a new rule, click the New Rule button in the Rules and Alerts dialog. The Rules and Alerts wizard will then launch.



Starting from a template

First, choose to start from a template or a blank rule. Then click the blue underlined items to choose a specific condition.

Stay Organized

-  Move messages from someone to a folder
-  Move messages with specific words in the subject to a folder
-  Move messages sent to a distribution list to a folder
-  Delete a conversation
-  **Flag messages from someone for follow-up**
-  Move Microsoft Office InfoPath forms of a specific type to a folder
-  Move RSS items from a specific RSS Feed to a folder

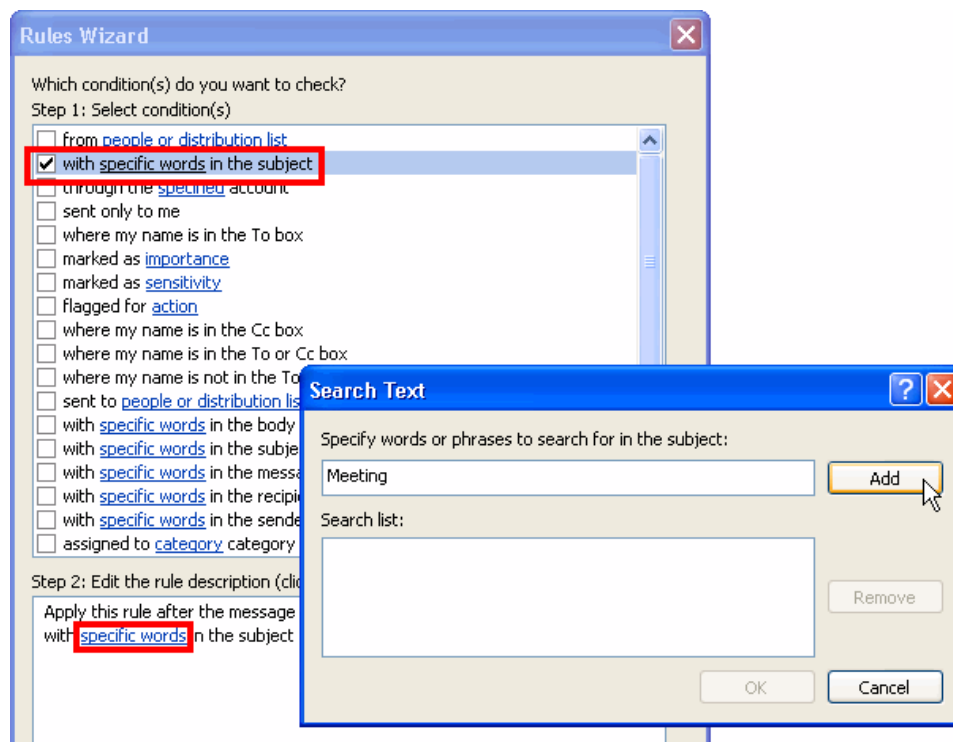
Apply this rule after the message arrives
from people or distribution list
flag message for follow up at this time

Example: Flag mail from my manager for follow-up today

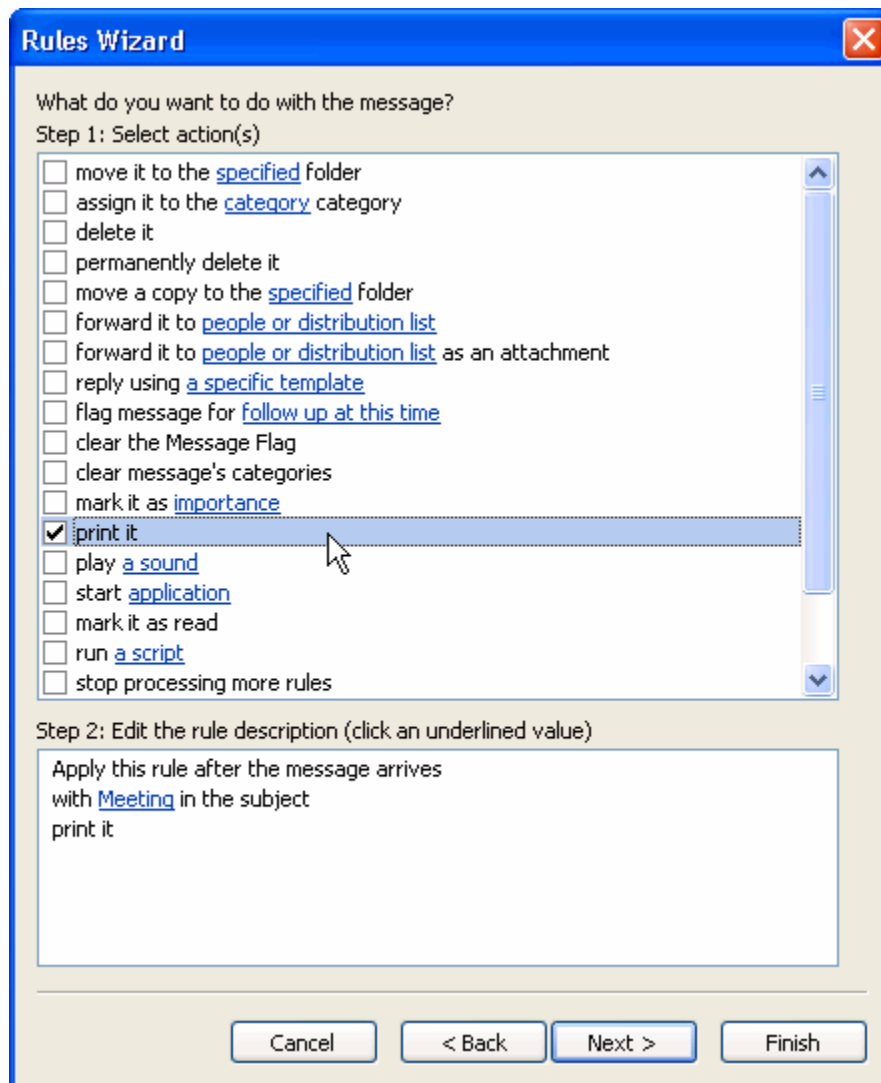
If you start from a template, the remaining steps in the wizard will be filled out for you. Simply confirm your choices by clicking Next, or click Finish at any point.

Starting from a blank rule

If you choose to use a blank rule, none of the boxes will be checked when you click Next, so it's up to you what conditions you pick. It's the same idea as before: check the conditions in Step 1, and then click the underlined value in Step 2 to specify your information. In this example, we checked "with specific words in the subject" and then clicked "specific words" in Step 2. Now we'll type the words and click Add.



Once you've set the options in this window (you can check as many as you want) and filled out the values, you can click Next. (If you forget to click an underlined value in step 2, Outlook will force you to fill out the information before you proceed.) You will then see this window:



This is where you can tell Outlook what to do when the conditions that you specified in the first part of the wizard are met. Once you check an item in Step 1 of this box, you may need to click the underlined value in Step 2 to specify your information. You will also see the conditions that you chose in the previous dialog listed.

Once we click Next, we'll see our last set of options.

Rules Wizard

Finish rule setup.

Step 1: Specify a name for this rule

Meeting

Step 2: Setup rule options

Run this rule now on messages already in "Inbox"

Turn on this rule

Create this rule on all accounts

Step 3: Review rule description (click an underlined value to edit)

Apply this rule after the message arrives
with Meeting in the subject
print it

Cancel < Back Next > Finish

Step 1 in this window is to name your rule; this is the name that will appear in the main Rules and Alerts screen.

In Step 2, you can tell Outlook when to run the rule. The first option tells Outlook to run the rule on messages already in the folder you're in. (You can't change the folder for this first option; you can just check the box to run the rule, or uncheck the box so the rule isn't run in that folder.) The next box is checked by default; this will turn your rule on. The third box, "Create this rule on all accounts," is available only if you have multiple e-mail accounts set up.

Step 3 gives you a summary of the conditions, actions, and exceptions for the rule you've created. Once you're done, you can click Finish, and you'll be back to the main Rules and Alerts screen.

Here, you can click Apply and OK to save your changes, or cancel to remove your changes. (Be careful; if you've added a rule but you cancel out of the Rules and Alerts box, that rule will be deleted.)

In summary, there are three ways to create rules in Outlook:

- Create Rule box: The easiest way with only the most frequently used options available.
- Rules and Alerts main screen: A few more options and a nicer interface, but still pretty easy to use.
- Rules Wizard: More time-consuming and complicated, but has all options available.

Once you get the majority of the messages sorted into folders, you can delete the rule if you'd like. If you want to leave it in place, notice that some of the rules may move messages from your Inbox to a folder before you read them (If that's how you created the rule). You'll have to open those folders in order to read the messages.