

Manage e-mail messages with rules

Applies to: Microsoft Outlook 2010







A rule is an action that Microsoft Outlook performs automatically upon incoming or outgoing messages, based on conditions that you have specified. You can create a rule from a template, from a message, or using your own conditions.

How rules help you manage e-mail messages




A rule is an action that Microsoft Outlook takes automatically on an arriving or sent message that meets the conditions that you specify in the rule. You can choose many conditions and actions by using the Rules Wizard. Using rules can help you stay organized and up-to-date.

Rules fall into one of two categories — organization and notification. Rules do not operate on messages that have been read, only on those that are unread.



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 public group to a folder
-  Flag messages from someone for follow-up
-  Move Microsoft InfoPath forms of a specific type to a folder
-  Move RSS items from a specific RSS Feed to a folder

Stay Up to Date

-  Display mail from someone in the New Item Alert Window
-  Play a sound when I get messages from someone
-  Send an alert to my mobile device when I get messages from someone

Start from a blank rule

-  Apply rule on messages I receive
-  Apply rule on messages I send

The Rules Wizard includes templates for the most commonly used rules, which include:

- **Stay Organized** These rules help you to file and follow up on messages. For example, you can create a rule for messages from a specific sender, such as Bobby Moore, with the word "sales" in the **Subject** line, to be flagged for follow-up, categorized as Sales, and moved to a folder called Bobby's Sales.
- **Stay Up to Date** These rules notify you in some way when you receive a particular message. For example, you can create a rule that automatically sends an alert to your mobile device when you receive a message from a family member.
- **Start from a blank rule** These are rules that you create without the aid of a rule template and that you can completely customize.

Create a rule

Outlook includes rule templates for common scenarios. You can use these rule templates, or create design your own custom rules.

Use Outlook rule templates

1. Click the **File** tab.
2. Click **Manage Rules & Alerts**.
3. In the **Rules and Alerts** dialog box, on the **E-mail Rules** tab, click **New Rule**.
4. Under **Step 1: Select a template**, select the template that you want from the **Stay Organized** or **Stay Up to Date** collection of templates.

5. Under **Step 2: Edit the rule description**, click an underlined value. For example, if you click the **people or public group** link, the Address Book opens.
6. Click **Next**.
7. Under **Step 1: Select condition(s)**, select the conditions that you want the messages to meet for the rule to apply.
8. Under **Step 2: Edit the rule description**, click an underlined value for any condition you added, and then specify the value.
9. Click **Next**.
10. Under **Step 1: Select action(s)**, select the action that you want the rule to take when the specified conditions are met.
11. Under **Step 2: Edit the rule description**, click an underlined value for any action you added, and then specify the value.
12. Click **Next**.
13. Under **Step 1: Select exception(s)**, select any exceptions to the rule, and then click **Next**.
14. Under **Step 2: Edit the rule description**, click an underlined value for any exception you added, and then specify the value.
15. Click **Next**.
16. Under **Step 1: Specify a name for this rule**, enter a name.
17. Under **Step 2: Setup rule options**, select the check boxes for the options that you want.
 - If you want to run this rule on messages that already are in the **Inbox**, select the **Run this rule now on messages already in "Inbox"** check box.
 - By default, the new rule is turned on. To turn off the rule, clear the **Turn on this rule** check box. You can turn the rule on later.
 - To apply this rule to all your e-mail accounts set up in Outlook, select the **Create this rule on all accounts** check box.
18. Click **Finish**.

Design a custom rule

1. Click the **File** tab.
2. Click **Manage Rules & Alerts**.
3. In the **Rules and Alerts** dialog box, on the **E-mail Rules** tab, click **New Rule**.
4. Under **Start from a blank rule**, click either **Check messages when they arrive** or **Check messages after sending**.
5. Click **Next**.
6. Under **Step 1: Select condition(s)**, select the conditions that you want the messages to meet for the rule to apply.
7. Under **Step 2: Edit the rule description**, click an underlined value for any condition you added, and then specify the value.
8. Click **Next**.
9. Under **Step 1: Select action(s)**, select the action that you want the rule to take when the specified conditions are met.
10. Under **Step 2: Edit the rule description**, click an underlined value for any action you added, and then specify the value.
11. Click **Next**.
12. Under **Step 1: Select exception(s)**, select any exceptions to the rule, and then click **Next**.
13. Under **Step 2: Edit the rule description**, click an underlined value for any exception you added, and then specify the value.
14. Click **Next**.
15. Under **Step 1: Specify a name for this rule**, enter a name.
16. Under **Step 2: Setup rule options**, select the check boxes for the options that you want.
 - If you want to run this rule on messages that already are in the **Inbox**, select the **Run this rule now on messages already in "Inbox"** check box.
 - By default, the new rule is turned on. To turn off the rule, clear the **Turn on this rule** check box. You can turn the rule on later.

- To apply this rule to all your e-mail accounts set up in Outlook, select the **Create this rule on all accounts** check box.
17. Click **Finish**.

Create a rule based upon senders or recipients of a message

A rule can be quickly created from any message. The advantage of creating a rule this way is that rules are suggested based upon the message sender or recipients. For example, when starting with a message, one rule that is suggested moves all messages from that sender to a folder that you choose.

1. Click the message for which you want to create a rule, and then on the **Home** tab, in the **Move** group, click **Rules**.
2. Suggested rules appear based upon the message sender and recipients.
3. Do one of the following:
 - Click one of the suggested rules, click a destination folder, and then click **OK**.
 - For more rules options based upon the sender, recipients, or subject of the message, click **Create Rule**.

If you chose **Create Rule** in step 2, the **Create Rule** dialog box appears. Continue with the following steps.

1. Under **When I get e-mail with all of the selected conditions**, select the check boxes for the conditions that you want.
2. Under **Do the following**, select the check boxes for the action that you want the rule to take when the specified conditions are met.
3. Select the **Move the item to folder** check box.
4. Click an existing folder or click **New** to create a new folder to store the messages.

To add more conditions, actions, or exceptions to the rule, click **Advanced Options**, and then follow the rest of the instructions in the **Rules Wizard**. This is the same wizard that appears when you go to **Manage Rules & Alerts** in the Backstage view (by clicking the **File** tab). See *Design a custom rule* for more information.

1. Click **OK**.

Run rules manually

1. If you want to manually run one or more rules, do the following:
2. Click the **File** tab.
3. Click **Manage Rules & Alerts**.
4. Click **Run Rules Now**.
5. In the **Run Rules Now** dialog box, under **Select rules to run**, select the check box next to each rule that you want to run.
6. In the **Run in Folder** box, if you want to select a different folder, click **Browse**, click the folder, and then click **OK**.
7. Select the **Include subfolders** check box to include all folders under the folder specified in step 5.
8. In the **Apply rules to** list, the default is all messages. You can change this to read or unread messages.
9. Click **Run Now**.

Server-based rules versus client-only rules

There are two types of rules in Outlook — server-based and client-only.

• **Server-based rules** If you are using a Microsoft Exchange Server account, some rules that you create are server-based rules. These rules run on your mailbox on the Exchange mail server, even when Outlook is not running on your computer. Server-based rules must apply to messages when they are first delivered to your **Inbox**, and the rules must be able to run until they are completed on the server. For example, a rule that specifies that a message be printed cannot run until it is completed on the server. If a rule cannot be applied on the server, it is applied when you start Outlook and becomes a client-only rule.

• **Client-only rules** Client-only rules are rules that run only on your computer. These are rules that cannot run until they are completed on the server, such as specifying to print certain messages. Client-only rules can only run when Outlook is running.

If your list of rules contains both kinds of rules, the server-based rules are applied first, followed by the client-only rules.

Applying rules to other Outlook items

Delivery receipts, voting responses, and Automatic Replies

When rules are applied, delivery receipts, read receipts, voting responses, and Automatic Replies (Out of Office notifications) are processed as if they are messages. For example, a rule that moves items (item: An item is the basic element that holds information in Outlook (similar to a file in other programs). Items include e-mail messages, appointments, contacts, tasks, journal entries, notes, posted items, and documents.) with the word "meeting" in the subject to a specific folder, also moves all delivery receipts, voting responses, or an Automatic Reply that contains the word "meeting" in the subject.

NOTE When a rule moves voting responses from the **Inbox** to another folder, your vote tracking is affected. When you open a sent message that included voting button, the tracking information will not include a tally for responses that a rule moved. Manually moving or deleting a response does not affect the tracking.

Meeting requests, task requests, and documents

When applying rules, meeting requests, task requests, and documents are treated as messages. For example, when you create a rule that moves items (item: An item is the basic element that holds information in Outlook (similar to a file in other programs). Items include e-mail messages, appointments, contacts, tasks, journal entries, notes, posted items, and documents.) with the word "meeting" in the **Subject** box to a specific folder, any task request or meeting request that meets that condition is moved also. However, be aware the following limitations when you create rules that affect these kinds of items:

- An item moved to a non-mail folder might not work as you expect after it is moved. For example, if a message is moved to the **Calendar** folder, a new appointment is not created.
- If a meeting or task response is moved to the Deleted Items folder by using a rule, the response is not tracked by the original item.
- If a meeting request is automatically moved to the **Deleted Items** folder, the meeting is not added to the **Calendar**.
- Rules that affect messages that you send are not applied to task requests and meeting requests.

Contact Groups

A rule that includes a Contact Group can behave differently depending on how the rule is created.

- **Move messages sent to a Contact Group folder** This rule is available only if you are using an Exchange Server account. Only messages that are sent to the Contact Group are moved to the specified folder. Messages from people who are members of the Contact Group are not moved to the specified folder.

Forwarding messages outside your organization

If you are using a Microsoft Exchange Server 2010 account, by default, you cannot use rules to forward messages to e-mail addresses outside your organization. This setting helps prevent confidential and private organizational information from being disclosed. This setting can only be changed by an Exchange administrator.