Ready Reference 042013

Creating a Rule to Filter E-mail in Outlook 2010

Introduction

Rules automate the process of relocating incoming messages. By default, incoming messages are stored in your Inbox, but rules can be created based on certain criteria to automatically move those emails to other folders. This document contains instructions on creating a rule for filtering email from an individual sender or email distribution list to a specified folder.

To set up a Rule to move a new message from a specific person or distribution list:

- open **Outlook** and select **Mail** at the bottom of navigation pane
- click **Home** tab and select **Rules** from Move Group
- click Manage Rules and Alerts...

The Rules and Alerts dialog box displays.

	and Alerts
E-n	nail Rules Manage Alerts
	🔌 New Rule Change Rule 🖛 🗈 Gopy 🗙 Delete 🛛 🗢 💌 Run Rules Now Options
	Rule (applied in the order shown) Actions
	Select the "New Rule" button to make a rule.
Ru	/e description (dick an underlined value to edit):
]Enable rules on all messages downloaded from RSS Feeds
	OK Cancel Apply
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	Rules Wizard
	Start from a template or from a blank rule
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• click people or public group link under Step 2: Edit the rule description

Use the Rule Address dialog box to select a person or group to whom the rule applies.

Search: 🖲 Name only 🔘 M	ore columns Address Book	- charris@pace.edu
Name	Title	Business Phone
1 Pace Plaza Room W210		*
8 1, Student		
8 10, Student		
8 11, Student		
8 12, Student		
8 13, Student		
8 14, Student		
8 140W Security		+1 (212) 618-6140
§ 15, Student		
156 WilliamConference		
156William DevarConference	aRm524	
8 16, Student		
I63 William Conference 407	A	
163 WilliamConference		
163 Williams Street Room 2	005	
I63 Williams Street Room 2	010	
163 Williams Street Room 2	015	•
*		•
From ->		

To add email address:

- look up *email address* in the search field and click **From** -or-
- type external email address in the From field
- click **OK**

Once the name or distribution list is selected the designated folder needs to be selected:

• click specified link under Step 2: Edit the rule description



- select the folder to which you want to move incoming messages
- click **OK**
- click Finish
- Note: If you are designating a folder under Personal folders, a message appears "This rule is a client-only rule, and will process only when Outlook is running." Click OK and continue. If you designate a folder under the Exchange server client you will not receive this message since Outlook is not required to be running for the rule to take effect.
- click Apply to activate rule
- click OK

Editing a Rule

- click Home tab and select Rules from Move Group
- click Manage Rules and Alerts...
- select the *rulename* to edit
- click **Change Rule** on the toolbar
- select Edit Rule Settings
- make any necessary changes to the rule
- click **Finish** to save the changes
- click **Apply** to activate rule

To close the *Rules and Alerts* dialog box:

• click **OK**

Deleting a Rule

- click **Home** tab and select **Rules** from Move Group
- click Manage Rules and Alerts...
- select the *rulename* to delete and click **Delete**

A message displays "Delete rule "rulename"?"

Where *rulename* is the name of the rule to be deleted.

• click Yes

To close the *Rules and Alerts* dialog box:

• click **OK**

Additional options for creating Rules

There are several other Rules to filter messages in Outlook 2010. You can set rules based on words in the subject line, sender's name, or play alerts when certain mail arrives. The following table details the additional options for setting up a rule:

Rule	Description
Move messages from someone to a folder.	Messages from a certain person or distribution list are moved to a specified folder.
Move messages with specific words in the subject to a folder.	Messages are moved to specific folders based on words found in the subject or body of the message.
Move messages sent to a public group to a folder.	Message that are sent to a specified distribution list are moved to a designated folder.

Flag messages from someone for follow-up.	Flags a message from a specified sender with a specific color.
Move Microsoft InfoPath forms of a specific type to a folder	Moves a Microsoft Office InfoPath form that you received to a designated folder.
Move RSS items from a specific RSS Feed to a folder	Moves RSS items from a feed to a designated folder.
Display mail from someone in the New Item Alert Window.	Message sent from certain people or distribution lists are placed under a New Item Alert window.
Play a sound when I get messages from someone.	Plays a custom sound when messages are received from someone.
Send an alert to my mobile device when I get messages from someone.	Sends alert to cell phone when messages are received from someone.

Note: If you would like to set up additional rules based on another criteria, use one of the rules from above and follow the instructions on page 1.