Outlook 2016: Creating Mailbox Rules

Manage email messages by using rules

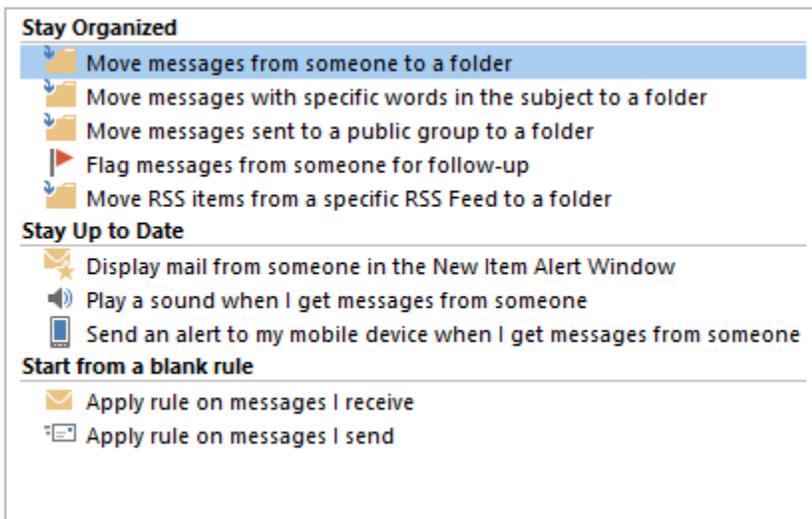Applies To: Outlook 2016 Outlook 2013 More... Less

A rule is an action that Outlook 2016 or Outlook 2013 for Windows runs automatically on incoming or outgoing messages. You choose what triggers the rule as well as the actions the rule takes. For example, you can create a rule to move all messages from your manager to a folder or to delete all messages with "Buy now!" in the subject.

How rules help you manage email messages

By using rules, you can reduce manual and repetitive actions needed to manage your email messages. When you turn on rules, they run continuously and automatically.

Rules generally fall into one of two categories—organization or notification. You can use the Rules Wizard to help you design rules to manage your messages.

The Rules Wizard includes templates for the most frequently used rules.

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 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

- **Stay Organized**
  These rules help you not only to file messages, but also to follow-up with messages. You can create a rule for messages from a specific sender. So you could set a rule, for example, that messages received from Keri Mills with the word "sales" in the **Subject** box are to be flagged for follow-up, categorized as Sales, and moved to a folder named Keri's Sales.
- **Stay Up to Date**
  These rules notify you—based on choices you make—when you receive a particular message. You can create a rule, for example, that automatically sends a message to a mobile device when you receive a message from a family member.
- **Start from a blank rule**
  These are rules that you can create and customize without a rule template.

Create a rule

Step 1: Choose an Outlook rules template

1. Choose **Rules** > **Manage Rules & Alerts** from the ribbon or choose the **File** tab and then choose **Manage Rules & Alerts**.
2. In the **Rules and Alerts** dialog box, on the **E-mail Rules** tab, choose **New Rule**.
3. In the **Rules Wizard**, under **Step 1: Select a template**, pick one of the default templates under **Stay Organized**, **Stay Up to Date**, or, **Start from a blank rule**.

Step 2: Edit the rule description

Each one of the rule templates that you chose in Step 1 has slightly different options for Step 2. When the options require you to make a choice, for example to specify a sender or choose a folder, the option will be underlined. For this example, we've picked one of the most common rules, to move messages from someone to a folder.

1. Choose **people or public group** in the edit description box to display your address book. Either choose a name from your address book or type the person's address in the **From** box, then choose **OK**.
2. Choose **specified** to display a list of your folders. You can choose an existing folder or choose **New** to create a new folder. When you've selected the appropriate folder, choose **OK**.

If you want to explore advanced options for the rule, choose **Next** and then skip to Advanced Rule Options, below. Otherwise, choose **Finish**. This returns you to the **Rules and Alerts** window. From here, you can create another rule or choose **OK** to save your changes.

• Move messages from someone to a folder

1. Choose the **people or public folder** link.

2. In the **Rule Address** dialog box, do one of the following:

   • In the **Search** box, type a *name*.

   or
   • In the **Address Book** list, choose a source.

3. When your selection is displayed in the **From** box, choose **OK**.

4. Choose the **specified folder** link, and in the **Rules and Alerts** dialog box, choose a folder, and then choose **OK**.

5. Choose **Next** and go to *Step 3: Set conditions for a rule*.

• Move messages with specific words in the subject to a folder

1. Choose the **specific words** the subject link.

2. In the **Search Text** dialog box, in the **Specify words or phrases to search for in the subject** box, type a *word or phrase* to be searched for.

3. Choose **Add** to add your entry to the **Search list** pane, and then choose **OK**.

4. Choose the **specified folder** link, and in the **Rules and Alerts** dialog box, choose a folder, and then choose **OK**.

5. Choose **Next** and go to *Step 3: Set conditions for a rule*.

• Move messages sent to a public group to a folder

1. Choose the **people or public folder** link.

2. In the **Rule Address** dialog box, do one of the following:

   • In the **Search** box, type a *name*.

   or
   • In the **Address Book** list, choose a source.

3. When your selection is displayed in the **To** box, choose **OK**.

4. Choose the **specified folder** link, and in the **Rules and Alerts** dialog box, choose a folder, and then choose **OK**.

5. Choose **Next** and go to *Step 3: Set conditions for a rule*.

• Flag messages from someone for follow-up

1. Choose the **people or public folder** link.

2. In the **Rule Address** dialog box, do one of the following:

   • In the **Search** box, type a *name*.

   or
   • In the **Address Book** list, choose a source.

3. When your selection is displayed in the **From** box, choose **OK**.

4. In the **Flag Message** dialog box, in the **Flag to** box, accept the default setting of **Follow up**, or choose another item in the list.

5. In the **For** box, accept the default setting of **Today** or choose another item in the list.

6. Choose **OK** > **Next**, and then go to *Step 3: Set conditions for a rule*.

• Move RSS items from a specific RSS Feed to a folder

Note: To use this option, you must subscribe to an RSS feed. When you choose this option, there is a prompt to continue. If you choose **No**, you can't proceed, but if you choose **Yes**, you can.

Stay Up to Date template

• Display mail from someone in the New Item Alert Window

1. Choose the **people or public folder** link.

2. In the **Rule Address** dialog box, do one of the following:

   • In the **Search** box, type a *name*.

   or
   • In the **Address Book** list, choose a source.

3. When your selection is displayed in the **From** box, choose **OK**.

4. Choose the **specific message** in the New Item Alert window link.

5. In the **Alert Message** dialog box, in the **Specify an alert message** box, type a *message*, and then choose **OK**.

6. Choose **Next**, and then go to *Step 3: Set conditions for a rule*.

• Play a sound when I get messages from someone

1. Choose the **people or public folder** link.

2. In the **Rule Address** dialog box, do one of the following:

   • In the **Search** box, type a *name*.

   or
   • In the **Address Book** list, choose a source.

3. When your selection is displayed in the **From** box, choose **OK**.

4. Choose the **play a sound** link, and in the **Select a Sound to Play** window, choose a file (for example, a .wav file), and then choose **Open**.

5. Choose **Next**, and then go to *Step 3: Set conditions for a rule*.

• Send an alert to my mobile device when I get messages from someone

1. Choose the **people or public folder** link.

2. In the **Rule Address** dialog box, do one of the following:

   • In the **Search** box, type a *name*.

   or
   • In the **Address Book** list, choose a source.

3. When your selection is displayed in the **From** box, choose **OK**.

4. Choose the **forward it to people or public group** link.

5. In the **Rules Address** dialog box, do one of the following:

   • In the **Search** box, type a *name*.

   or
   • In the **Address Book** list, choose a source.

6. When your selection is displayed in the **To** box, choose **OK**.

7. Choose **Next**, and then go to *Step 3: Set conditions for a rule*.

Start from a blank rule template

1. Choose one of the following.

- **Apply rule on messages I receive**

  or
- **Apply rule on messages I send**

2. Choose **Next**, and then go to *Step 3: Set conditions for a rule*.

Step 3: Set conditions for a rule

You now have the opportunity to add conditions to the options you chose in *Step 2: Choose a template option*. Based on the conditions you select, the options available to edit the rule description will vary.

1. Under **Step 1: Select condition(s)**, select the check box for the condition you want to add.

    Note: You can select multiple check boxes.
2. Under **Step 2: Edit the rule description (click an underlined value)**, choose a link, complete the required actions, and when done, choose **OK**.
3. Choose the next link, complete the required actions, and when done, choose **OK**.
4. If another link is available, choose it, complete the required actions, and when done, choose **OK**.
5. Choose **Finish** when done.