Creating a Rule for Your Inbox

- You can manage your e-mail messages by using rules to automatically perform actions on messages. After you create a rule, the Microsoft Outlook Rules Wizard applies the rule when messages arrive in your Inbox or when you send a message. For example, you can automatically:
  - Forward to your manager all messages sent by Judy Lew when they arrive in your Inbox.
  - Assign the category Sales to all messages you send that have the word "sales" in the Subject box.
  - You can add exceptions to your rules for special circumstances, such as when a message is flagged for follow-up action or is marked with high importance. A rule is not applied to a message if any one of the exceptions you specify is met.
  - Move messages from a specific person to a sub-folder of your Inbox or to a Personal Folder

How to Create a New Rule Using the Rules Wizard

In this example, a rule is created that moves mail addressed from CIS Helpdesk out of the Inbox into a sub-folder in the Inbox called CIS Helpdesk. (This folder could be a personal folder which would help to save space in the mailbox.) Outlook automatically moves the message when it is delivered.

1. Run Outlook
2. Click on the Tools tab and Select Rules Wizard
   You will see the following screen:
3. In the above window, click on **New**, and you will see the screen below:
4. In the above window, click on 'Move new messages from someone' and Click Next >

You will then see the following screen:
5. In the above window, the option 'from people or distribution list' should be checked by default. If it's not then click the box to the left of this option.

6. In the bottom box titled 'Rule description,' click on the hyperlink people or distribution list.

You will then see the following screen:
7. Find the name you want to use in your rule from the list of names on the left. Highlight the name and click the From > box in the middle of the window. The name should be added to the right box titled 'Specify the address of the sender.' Click on OK

8. Click Next on the Rules Wizard screen and you will see the following screen:
9. In the above window, the first option 'move it to the specified folder' should be checked by default, but check it if not.

10. Under Rule description, click on the hyperlink 'move it to the specified folder' and you will see the following screen:
11. In the above window, select **New...** (unless you have already created the sub-folder). You will see the following screen:
12. In the above window type the Name of the new sub-folder you would like to create.

13. Highlight the folder where you want the sub-folder created under (in the above example the sub-folder is being created in the Inbox folder) and click **OK**

You will then see the following screen which shows the new sub-folder.

![Rules Wizard window](image)

14. In the above window, highlight the new sub-folder you created and click on **OK** which will carry you back to this screen:
15. In the above window, click **Next >** and you will the window below:
16. In the above window select any exceptions you may have to the rule and click Next>

You will see the following screen:
17. From the above window, you can name the rule whatever you would like. If you would like to run the rule on all messages currently in your Inbox click the second option 'Run this rule now on messages already in the Inbox'. (In our example, Outlook would sort through the Inbox and move all messages from CIS Helpdesk into the sub-folder titled CIS Helpdesk.)

If you want to turn this rule on, put a check in the box beside 'Turn on this rule'

18. Click Finish and you will see the following screen:
In the above window, you make changes to the rule by clicking **Modify**; you can turn the rule off by clearing the check in the box beside the name of your rule.

19. Click on **OK** and you are done.