



A fresh approach to IT support and expertise.

Microsoft Outlook

Outlook Rules automate your inbox

What are Outlook Rules

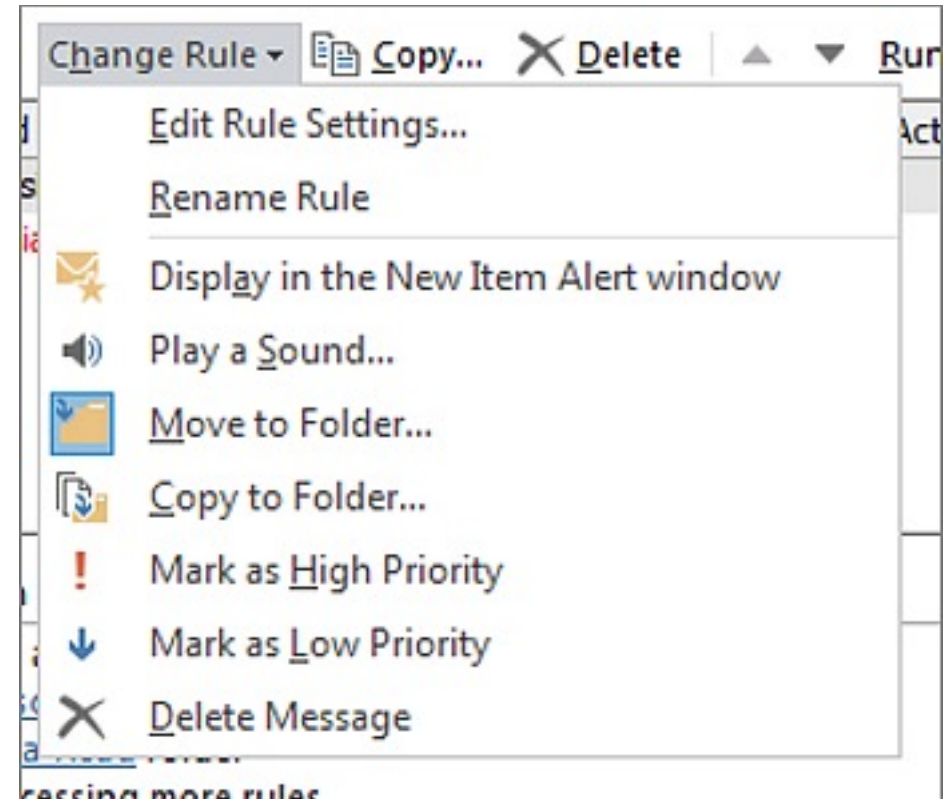
Automation for your inbox



Rules to organise

They act as filters or triggers based on predefined conditions, such as sender, subject line, keywords, or other criteria.

Automatically moving emails from your manager to a dedicated folder, with a reminder or pop-up message, so you never miss an important update.



What's achievable

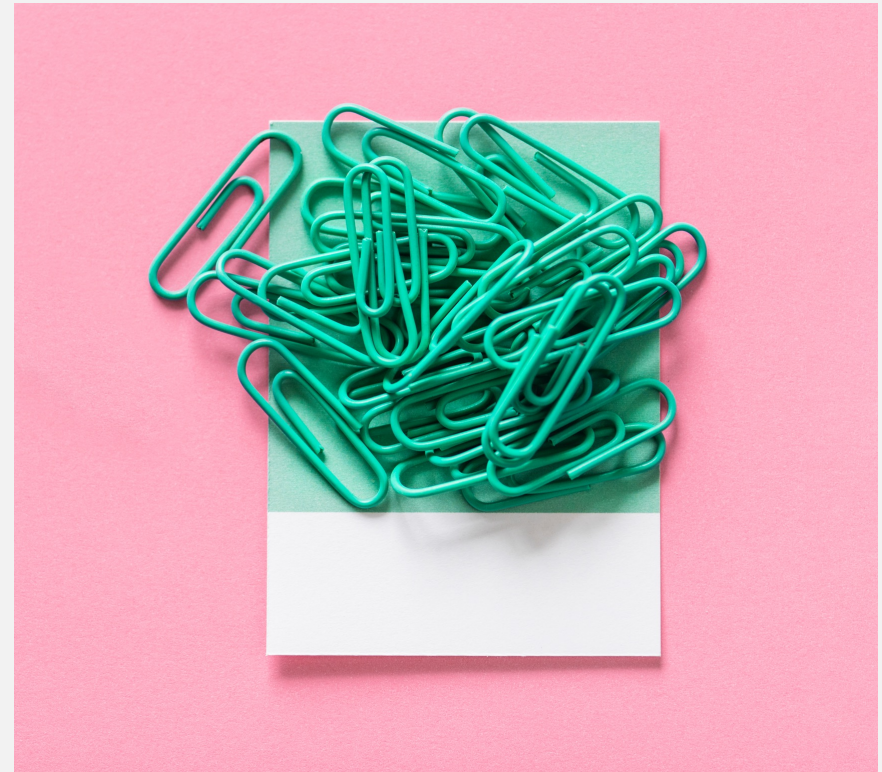
Save time and reduce inbox clutter



Practical examples

- Organise Emails
- Prioritise Important Emails
- Reduce Distractions
- Manage Tasks
- Declutter Your Inbox

Use rules to categorise incoming emails by project or team, so all related messages are grouped together.



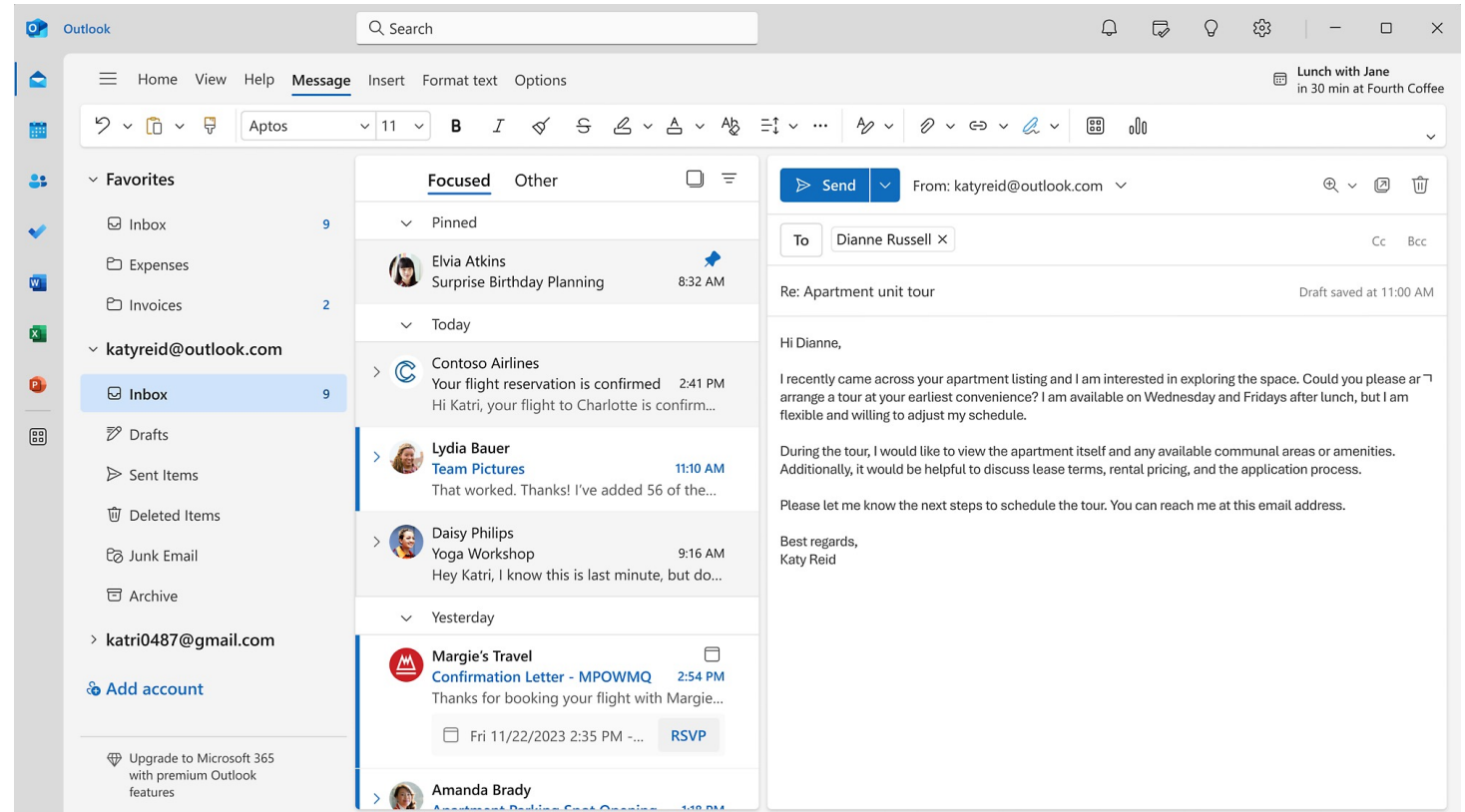
Limitations

Online versus Desktop versions



Desktop application

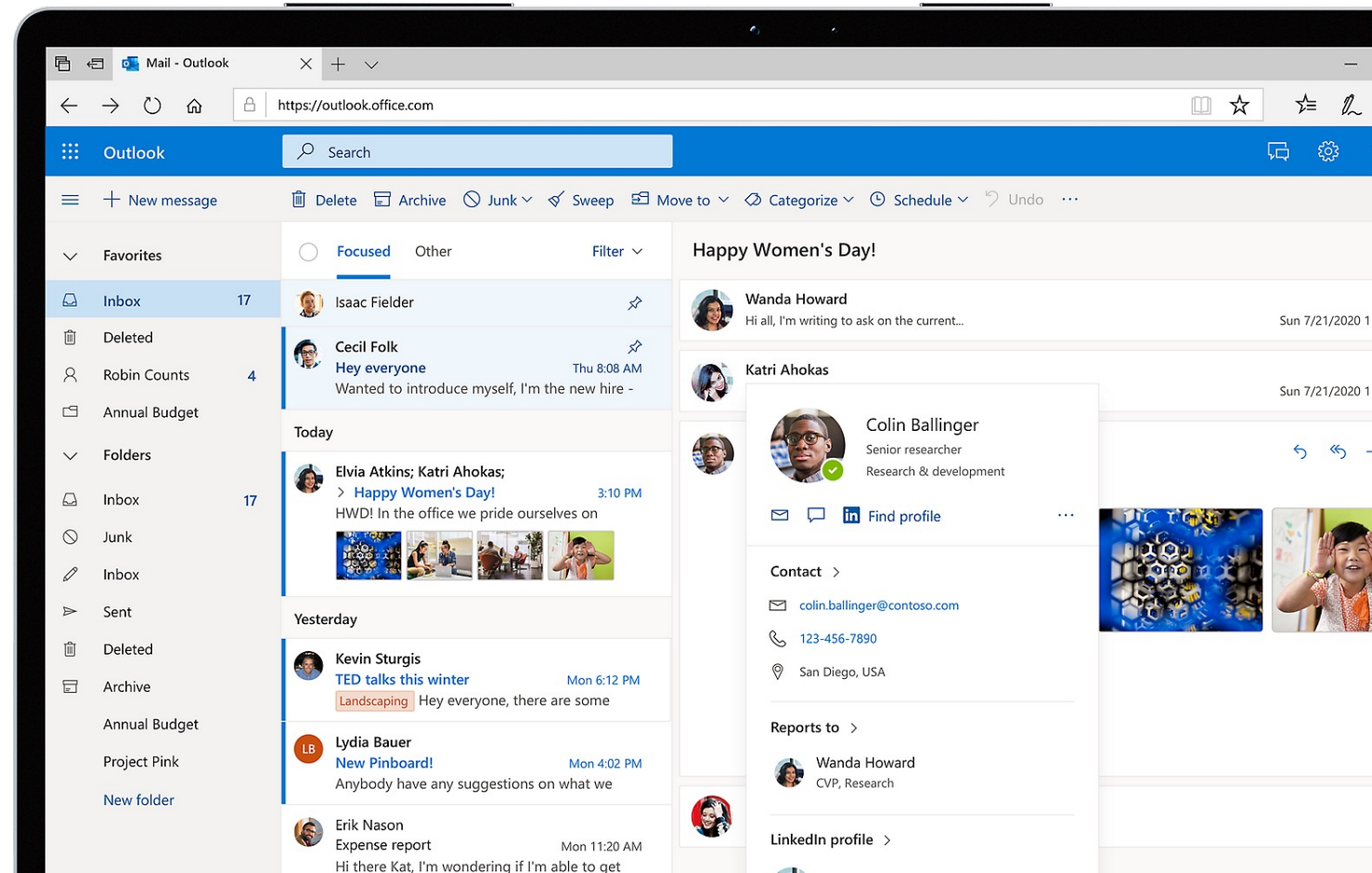
- More Advanced Rules
- Client-Side Rules
- Custom Conditions



Online/Web application

- Basic rules only
- Always running rules

If you need advanced rules, create them in the Desktop app. But if you want rules that work 24/7 without needing the app open, stick to server-side rules in Outlook Online.



Simple to Complex

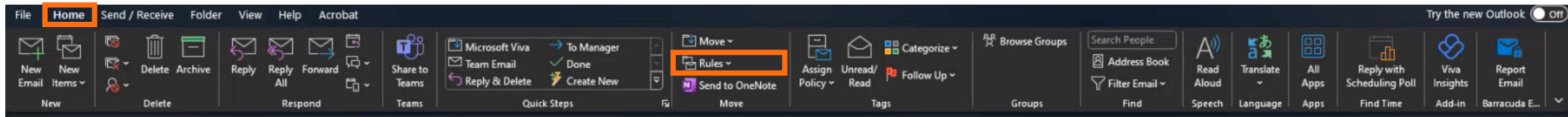
How to set up a rule



How to Set Up a Simple Rule (Desktop)

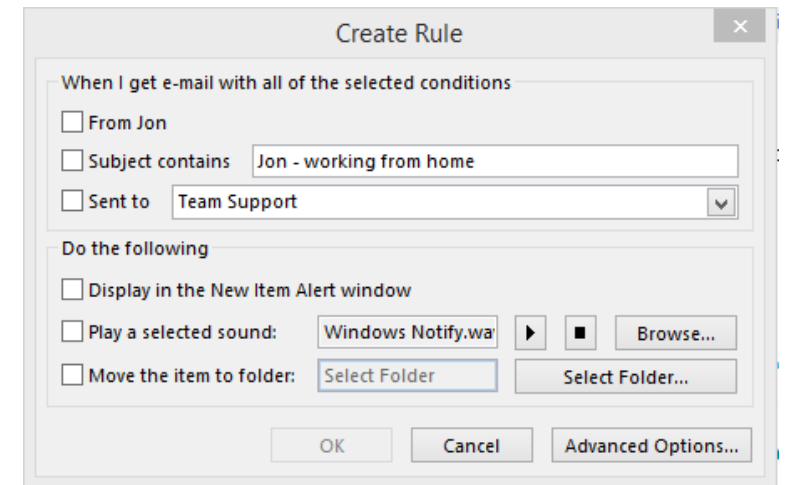
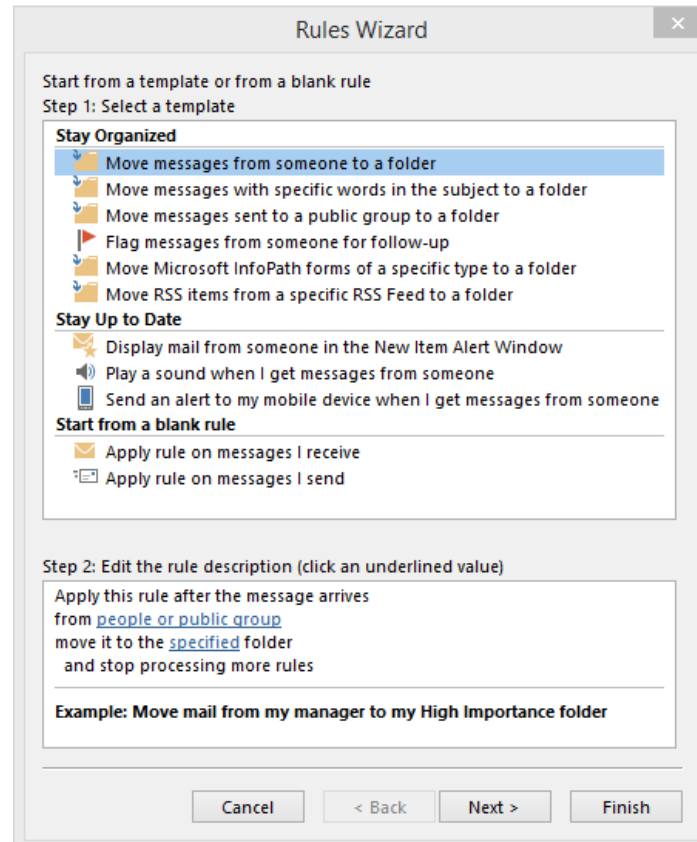
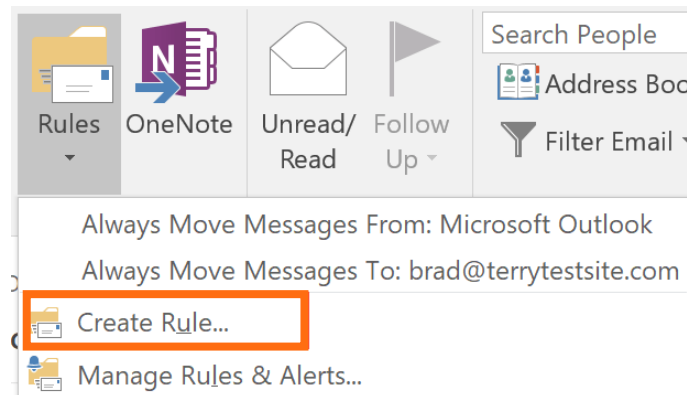
Open Outlook (Desktop) and go to the Home tab.

- Select Rules > Manage Rules & Alerts.



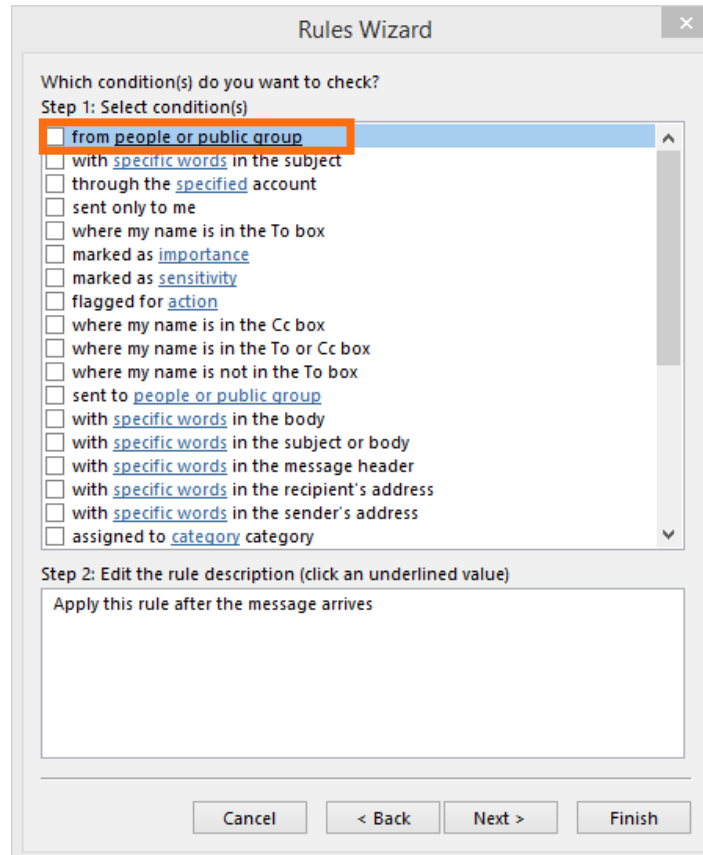
How to Set Up a Simple Rule (Desktop)

- Click **Create Rule**: you might see 'Start from a Blank Rule', choose 'Apply rule on messages I receive'.



How to Set Up a Simple Rule (Desktop)

- In the Rules Wizard, select **From people or public group** and choose your manager's email address.



Rules Wizard

Which condition(s) do you want to check?

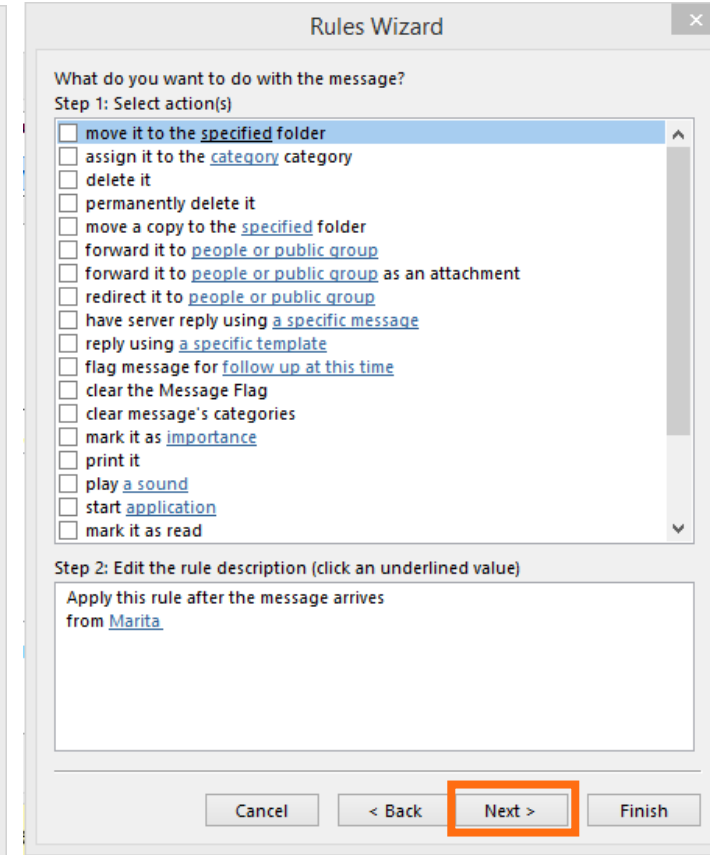
Step 1: Select condition(s)

- ☒ from people or public group
- ☐ with specific words in the subject
- ☐ through the specified account
- ☐ sent only to me
- ☐ where my name is in the To box
- ☐ marked as importance
- ☐ marked as sensitivity
- ☐ flagged for action
- ☐ where my name is in the Cc box
- ☐ where my name is in the To or Cc box
- ☐ where my name is not in the To box
- ☐ sent to people or public group
- ☐ with specific words in the body
- ☐ with specific words in the subject or body
- ☐ with specific words in the message header
- ☐ with specific words in the recipient's address
- ☐ with specific words in the sender's address
- ☐ assigned to category category

Step 2: Edit the rule description (click an underlined value)

Apply this rule after the message arrives

Cancel < Back Next > Finish



Rules Wizard

What do you want to do with the message?

Step 1: Select action(s)

- ☒ move it to the specified folder
- ☐ assign it to the category category
- ☐ delete it
- ☐ permanently delete it
- ☐ move a copy to the specified folder
- ☐ forward it to people or public group
- ☐ forward it to people or public group as an attachment
- ☐ redirect it to people or public group
- ☐ have server reply using a specific message
- ☐ reply using a specific template
- ☐ flag message for follow up at this time
- ☐ clear the Message Flag
- ☐ clear message's categories
- ☐ mark it as importance
- ☐ print it
- ☐ play a sound
- ☐ start application
- ☐ mark it as read

Step 2: Edit the rule description (click an underlined value)

Apply this rule after the message arrives

from Marita

Cancel < Back **Next >** Finish

How to Set Up a Simple Rule (Desktop)

- Select the action to **Move it to the specified folder** and pick the folder you want.
- Click **Finish** and OK

Rules Wizard

Which condition(s) do you want to check?

Step 1: Select condition(s)

- ☒ from people or public group
- ☐ with specific words in the subject
- ☐ through the specified account
- ☐ sent only to me
- ☐ where my name is in the To box
- ☐ marked as importance
- ☐ marked as sensitivity
- ☐ flagged for action
- ☐ where my name is in the Cc box
- ☐ where my name is in the To or Cc box
- ☐ where my name is not in the To box
- ☐ sent to people or public group
- ☐ with specific words in the body
- ☐ with specific words in the subject or body
- ☐ with specific words in the message header
- ☐ with specific words in the recipient's address
- ☐ with specific words in the sender's address
- ☐ assigned to category category

Step 2: Edit the rule description (click an underlined value)

Apply this rule after the message arrives
from Marita
move it to the specified folder
and stop processing more rules

Cancel < Back Next > Finish

Rules Wizard

What do you want to do with the message?

Step 1: Select action(s)

- ☒ stop processing more rules
- ☒ move it to the specified folder
- ☐ assign it to the category category
- ☐ delete it
- ☐ permanently delete it
- ☐ move a copy to the specified folder
- ☐ forward it to people or public group
- ☐ forward it to people or public group as an attachment
- ☐ redirect it to people or public group
- ☐ have server reply using a specific message
- ☐ reply using a specific template
- ☐ flag message for follow up at this time
- ☐ clear the Message Flag
- ☐ clear message's categories
- ☐ mark it as importance
- ☐ print it
- ☐ play a sound
- ☐ start application

Step 2: Edit the rule description (click an underlined value)

Apply this rule after the message arrives
sent only to me
and from Marita
move it to the Test folder folder
and stop processing more rules

Cancel < Back Next > Finish

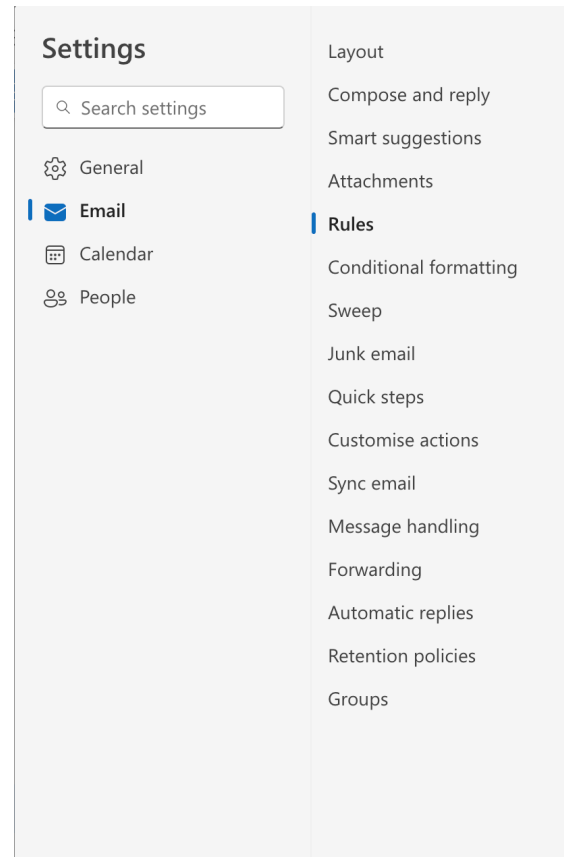
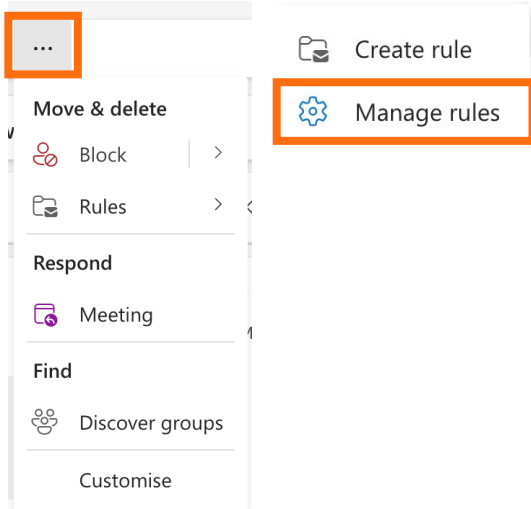
How to Set Up a Complex Rule (Desktop)

Open Outlook and go to the **Home tab**.

- Select Rules > Manage Rules & Alerts.
- Click New Rule, and again choose **Apply rule on messages I receive**.
- In the Rules Wizard, check from **people or public group**, and add the email addresses of the specific clients.
- Then, add the condition with **specific words in the subject**, such as project names or keywords.
- Choose the action to **Move it to a specified folder** and select a project folder.
- Additionally, select **flag it for follow-up at this time** and pick a time for follow-up.
- To complete, select the option to **forward it to people or public group**, and choose your team lead's email.
- Click **Finish** and OK.

A rule can hold exceptions: send pop up reminder windows, play a noise, set a reminder for the recipient

Online/Web app



Rules

You can create rules that tell Outlook how to handle incoming email messages. You choose both the conditions that trigger a rule and the actions the rule will take. Rules will run in the order shown in the list below, starting with the rule at the top.

[+ Add new rule](#)

- 1
- 2 Add a condition
- 3 Add an action

[Add an exception](#)

☒ Stop processing more rules ⓘ

People

From

To

Emails received for others

My name is

I'm on the To line

I'm on the Cc line

I'm on the To or Cc line

I'm not on the To line

I'm the only recipient

Subject

Subject includes

Subject or body includes

Keywords

Message body includes

Sender address includes

Recipient address includes

Message header includes

Marked with

Importance

Sensitivity

Message includes

Flag

Type

Has attachment

Message size

At least

At most

Received

Before

After

All messages

Apply to all messages

Additional Tips

- Prioritise Your Rules
- Use Exceptions
- Test Your Rules
- Clean up rules periodically
- Mailboxes



Recap

- **Rules:** powerful automation feature that helps you manage your inbox.
- **Organise, Prioritise, Reduce:** Rules can save you time and reduce inbox clutter by automating repetitive tasks.
- **Limits:** Key differences from online/web and desktop Rules capabilities.
- **Optimise:** Think about the goal and remember to do some housekeeping from time to time.





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