



# Rule Your Inbox

*Everything You Need To Know  
About Outlook Rules*

---

*Learn how rules can help you tame Outlook* .....3

*Create a simple rule effortlessly with the Organize pane*.....6

*Make Outlook sort your email for you: You just need to create a rule* .....7

*Tame your monster-sized Inbox by manually running new rules*.....8

*Easily organize all your email related to a particular client* ..... 11

*Keep personal messages out of your Inbox, so you can focus on work first* ..... 13

*Create a rule from an existing email message*.....14

*Automatically add flags to incoming messages for guaranteed reminders*..... 15

*Share your productivity secrets with others via rules* .....17

*Keep your cool and your job with a message delay rule*.....20

*The top-10 things you absolutely must know about Outlook’s rules* .....21

*Don’t miss that email message—have your cell phone deliver it* .....24

*Provide immediate customer communication with auto responses*.....27

*Painlessly Set up an auto response as a server-side rule* .....31

*Quickly categorize existing Outlook items for superior organization* .....32

*Stop obsessively checking for specific email: Let Outlook notify you when it’s received*.....36

**Copyright**

---

© 2007 Eli Journals. This work is an independently produced publication of Eli Research, the Content of which is the property of Eli Research or its affiliates or third-party licensors and which is protected by copyright law in the United States and elsewhere. The right to copy and publish the Content is reserved, even for Content made available for free, such as sample articles, tips, and graphics, none of which may be copied in whole or in part or further distributed in any form or medium without the express written permission of Eli Research. Requests for permission to copy or republish any Content may be directed to Holly Smith at (800) 508-1316 or via email at holly@medville.com. All product names or services identified throughout this journal are trademarks or registered trademarks of their respective companies. *Have information on copyright violations?* Call us! We'll share 25% of the net proceeds of all awards related to copyright infringement that you bring to our attention. Direct your confidential inquiry to Holly Smith at (800) 508-1316.

# Learn how rules can help you tame Outlook

by Ron Wilder

When you think of the word *rules*, creativity and freedom don't often come to mind. But what if you, as an Outlook user, were the one to make up all the rules? By creatively setting up email rules, you can experience near complete control over your email and be free to deal with mail on your own terms. Instead of scrambling to keep your inbox clear, you can set up rules to automatically move messages to personal or public folders, alert you when mail from certain senders arrives, automatically forward mail, and flag, categorize, or delete it. And you can control mail you send out in the same way. In this article, we'll show you how to set up a rule and put it to work.

**Application:**  
Microsoft Outlook  
2000/2002/2003

**Operating System:**  
Microsoft Windows

## Knowing the rules

To help you understand how mail rules can keep you from being inundated with extraneous email, we'll first examine the email priority phenomenon. Simply put, this is the idea that we all seem to have gotten stuck in our heads that email is more important than any other aspect of our work. We'll then highlight how you can use rules to act upon mail that you receive. Finally, we'll give you a couple of warnings before you implement any of your rules.

## Handling your mail

Mail rules are nothing more than specific actions you assign to incoming or outgoing email messages based on the attributes of the message itself. You set the criteria for the rules within Outlook and the actions you want to apply to the mail that matches those criteria. Then, as Outlook processes each piece of email, it compares that mail against

the criteria set up in the rule and performs the prescribed actions on any matching items.

For instance, you can set a rule to move any message you might receive from Eli Journals to a folder named Eli. But the beauty of mail rules is that you can set up several criteria within a single rule. So, instead of all mail from Eli Journals being moved to the Eli folder, you could move any mail that's from Eli Journals *and* which contains the phrase *Windows XP* in the subject line to another folder.

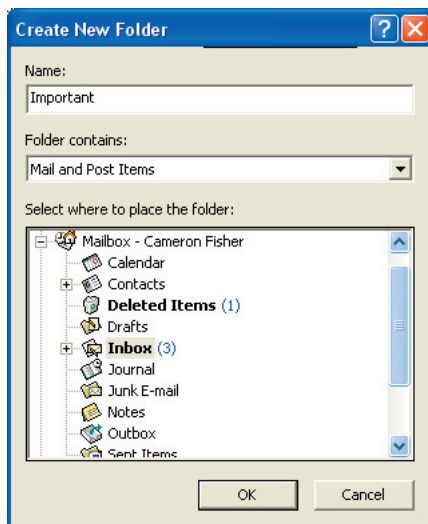
## Prioritize your email

You probably don't have time to read and respond to all of your email. And even if you did, doing so as you received it would certainly break your concentration. We suggest you create a number of folders and then create rules to move particular messages into the various folders. For example, you can set the rule to look for any email from a particular friend or coworker, and have Outlook automatically move that message to a separate folder. That way, you can see which folder has messages that you need to respond to quickly and which can wait. We'll set up a folder to receive our most important mail. To follow along with our scenario, you'll first need to create a new folder to contain your important mail.

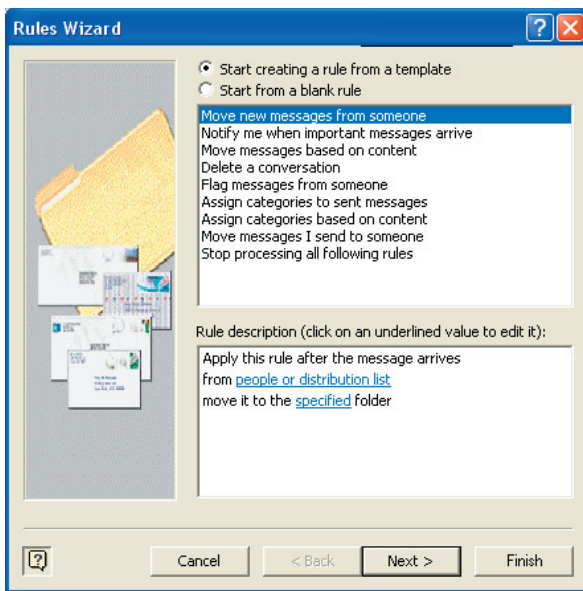
### To create a new folder:

1. Choose File | New | Folder in any Outlook view to display the Create New Folder dialog box shown in **Figure A**.
2. Enter the name for the new folder in the Name text box. (For our example, we'll name our folder *Important*.)

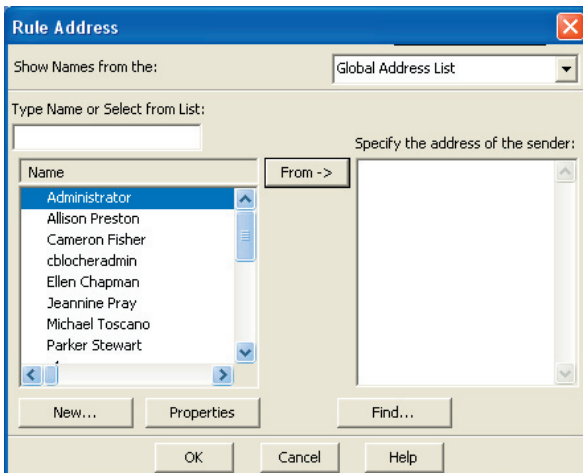
**A:** It helps to sort mail into folders so you can prioritize reading and answering messages.



3. Keep the default Mail And Post Items setting in the Folder Contains field (Mail Items for Outlook 2000).
4. Select the Inbox folder in the Select Where To Place The Folder list.
5. Click the OK button to dismiss the Create New Folder dialog box.
6. Click the Yes button when Outlook displays a prompt asking whether you want to add a shortcut for the folder to the Outlook Bar, since it makes the folder easier to access.



**B:** Moving messages from a specific sender is a common rule application.



**C:** You can choose as many email addresses or email groups as you wish for your rule.

## Create a rule

With your new folder created, you now need a mail rule that moves the mail according to your specifications. We'll create a mail rule that moves important mail to the Important folder.

### To create a rule:

1. Choose Tools | Rules And Alerts (Rules Wizard in 2002) and then click the New Rule button (New button in 2002). When you do, Outlook displays the dialog box shown in **Figure B**.
2. Select Move New Messages From Someone from the list box since you want the rule to work as you receive mail from a particular person. Make sure the Start Creating A Rule From A Template option button is selected at the top of the dialog box (not available in Outlook 2002), and then click the Next button.
3. Select From People Or Distribution List in the Which Condition(s) Do You Want To Check list.
4. Click on the People Or Distribution List hyperlink in the Rule Description section of the dialog box to display the Rule Address dialog box, as shown in **Figure C**.
5. Select the name or names that you wish to apply the rule to. If you want to select several names from the list, hold down the [Ctrl] key as you select them. If you want to select a contiguous list, hold down the [Shift] key as you select the beginning and end addresses.
6. Click the From button to add the names to the Specify The Address Of The Sender list and then click OK. The names appear in the Rule Description section of the Rules Wizard.
7. Click the Next button in the Rules Wizard dialog box to begin defining the action to apply to your mail.
8. Click on the Specified hyperlink in the Rule Description section to activate the Move It To The Specified Folder option. This displays the dialog box shown in **Figure D**.
9. Navigate to and select the folder named Important and click the OK button. (At this point, you can also create a new folder by clicking the New button and repeating the steps we