



## Microsoft Office Outlook

# Manage messages by using rules

---

Applies to: Microsoft Office Outlook 2007

---

 Hide All

This article explains what rules are and how you can use rules to stay organized and current with the activity in your **Inbox**.

## In this article

---

- ↓ [How rules help you manage messages](#)
  - ↓ [Create a rule from a template](#)
  - ↓ [Create a rule from scratch](#)
  - ↓ [Create a rule from a message](#)
  - ↓ [Run a rule periodically but not all the time](#)
  - ↓ [Server-based rules and client-only rules](#)
  - ↓ [Delivery receipts, voting responses, and out-of-office notices](#)
  - ↓ [Meeting requests, task requests, and documents](#)
  - ↓ [Distribution lists](#)
  - ↓ [Forwarding messages outside your organization](#)
- 

## How rules help you manage messages

A rule is an action that Microsoft Office Outlook takes automatically on an arriving or sent message that meets the conditions that you specify in the rule. You can choose many conditions and actions by using the Rules and Alerts Wizard. Rules do not operate on message that have been read, only on those that are unread.

Rules fall into one of two general categories: organization and notification. The Rules and Alerts Wizard contains templates for the most commonly used rules.

- **Stay organized** These are rules that help you to file and follow up on messages. For example, you can create a rule for messages from a specific sender, such as Bobby Moore, with the word "sales" in the **Subject** line, to be flagged for follow-up, categorized as Sales, and moved to a folder called Bobby's Sales.
  - **Stay up-to-date** These are rules that notify you in some way when you receive a particular message. For example, you can create a rule that automatically sends an alert to your mobile telephone when you receive a message from a family member.
  - **Start from a blank rule** These are rules that you create from scratch.
- 

Original page: <http://office.microsoft.com/en-us/outlook/HA100968031033.aspx>

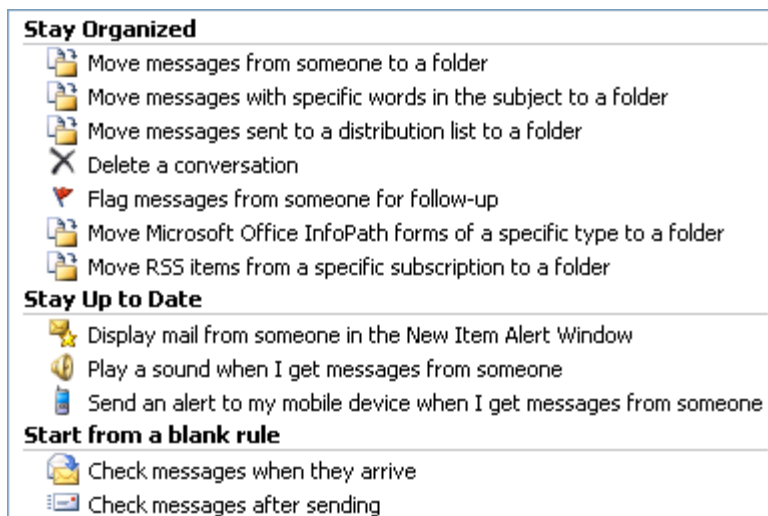


Fig. 2 The Rules and Alerts Wizard contains several predefined rules, called templates.

## Exceptions

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 even one of the exceptions that you specify is met.

[Top of Page](#)

## Create a rule from a template

1. In the Navigation Pane (Navigation Pane: The column on the left side of the Outlook window that includes panes such as Shortcuts or Mail and the shortcuts or folders within each pane. Click a folder to show the items in the folder.), click **Mail**.
2. On the **Tools** menu, click **Rules and Alerts**.
3. If you have more than one e-mail account, in the **Apply changes to this folder** list, select the **Inbox** that you want.
4. Click **New Rule**.
5. Under **Step 1: Select a template**, select the template that you want from the **Stay Organized** or **Stay Up to Date** collection of templates.
6. Under **Step 2: Edit the rule description**, click an underlined value. For example, if you click the **people or distribution list** link, the Address Book opens.
7. Under **Step 1: Select condition(s)**, select the conditions that you want the messages to meet for the rule to apply.
8. Under **Step 2: Edit the rule description**, click an underlined value if you have not done so already, and then click **Next**.
9. Under **Step 1: Select action(s)**, select the action that you want the rule to take when the specified conditions are met.
10. Under **Step 2: Edit the rule description**, click an underlined value if you have not done so already, and then click **Next**.
11. Under **Step 1: Select exception(s)**, select any exceptions to the rule, and then click **Next**.

12. To finish creating the rule, enter a name for the rule, and then select any other options that you want.
  - If you want to run this rule on messages that already are in one of your folders, select the **Run this rule now on messages already in "folder"** check box.
  - To apply this rule to all your e-mail accounts and the **Inbox** associated with each account, select the **Create this rule on all accounts** check box.
13. Click **Finish**.

[↑ Top of Page](#)

## Create a rule from scratch

To create a rule by choosing your own conditions, actions, and exceptions, do the following:

1. In the **Navigation Pane** (Navigation Pane: The column on the left side of the Outlook window that includes panes such as Shortcuts or Mail and the shortcuts or folders within each pane. Click a folder to show the items in the folder.), click **Mail**.
2. On the **Tools** menu, click **Rules and Alerts**.
3. If you have more than one e-mail account, in the **Apply changes to this folder** list, select the **Inbox** that you want.
4. Click **New Rule**.
5. Under **Start from a blank rule**, select either **Check messages when they arrive** or **Check messages after sending**, and then click **Next**.
6. Under **Step 1: Select condition(s)**, select the conditions that you want the messages to meet for the rule to apply.
7. Under **Step 2: Edit the rule description**, click an underlined value if you have not done so already, and then click **Next**.
8. Under **Step 1: Select action(s)**, select the action that you want the rule to take when the specified conditions are met.
9. Under **Step 2: Edit the rule description**, click an underlined value if you have not done so already, and then click **Next**.
10. Under **Step 1: Select exception(s)**, select any exceptions to the rule, and then click **Next**.
11. To finish creating the rule, enter a name for the rule, and then select any other options that you want.
  - If you want to run this rule on messages that already are in one of your folders, select the **Run this rule now on messages already in "folder"** check box.
  - To apply this rule to all your e-mail accounts and the **Inbox** associated with each account, select the **Create this rule on all accounts** check box.
12. Click **Finish**.

[↑ Top of Page](#)

## Create a rule from a message

You can create a rule directly from a message. For example, you can create a rule to move messages from someone to a specific folder.

1. Right-click the message that you want to base the rule on, and then click **Create Rule** on the shortcut menu.

In the **Create Rule** dialog box, select the check boxes for the options that are already filled in with information from your selected message.

2. Select the **Move the item to folder** check box.
3. Click an existing folder or click **New** to create a new folder to store the messages.
4. To add more conditions, actions, or exceptions to the rule, click **Advanced Options**, and then follow the rest of the instructions in the Rules and Alerts Wizard.

**Tip** To run the rule as soon as you create it, select the **Run this rule now on the messages already in folder** check box on the last page of the Rules and Alerts Wizard.

All the messages in your **Inbox**, or any folder that you choose, that meet the conditions and exceptions associated with the rule are moved to the specified folder. To test your new rule, open your new folder. Were the correct messages moved?

[Top of Page](#)

## Run a rule periodically but not all the time

If you want to run a rule periodically but not all the time, do the following:

1. On the **Tools** menu, click **Rules and Alerts**.
2. In the **Rules and Alerts** dialog box, turn the rule off by clearing the check box next to the rule.
3. Click **Run Rules Now**.
4. In the **Run Rules Now** dialog box, under **Select rules to run**, select the check box next to the rule that you want to run.
5. Select the folder that you want to apply the rule to.
6. Select the category of messages that you want to apply the rule to.

For example, you can apply the rule only to unread messages in a folder.

7. Click **Run Now**.

[Top of Page](#)

## Server-based rules and client-only rules

**Server-based rules** If you have a [Microsoft Exchange account](#), the server can apply rules to your messages even if Outlook is not running. These are called server-based rules. The rules must be set to be applied to messages when they are delivered to your **Inbox** on the server, and the rules must be able to run to completion on the server. For example, a rule cannot run to completion on the server if the action specifies that a message be printed. If a rule cannot be applied on the server, it is applied when you start Outlook.

**Client-only rules** A "client" is the e-mail program that runs on an individual's computer. A rule that cannot be applied by the

server is a "client-only rule" because it runs only on the individual's computer. If your list of rules contains rules that can be run on the server as well as those that cannot, the server-based rules are applied first, followed by the client-only rules.

[Top of Page](#)

## Delivery receipts, voting responses, and out-of-office notices

Delivery receipts, read receipts, voting responses, and out-of-office notices are treated as messages. For example, when you create a rule that moves **items** (**item: An item is the basic element that holds information in Outlook (similar to a file in other programs).** **Items include e-mail messages, appointments, contacts, tasks, journal entries, notes, posted items, and documents.**) with the word "meeting" in the **Subject** box to a specific folder, all delivery receipts, voting responses, and out-of-office messages that meet this condition are moved as well.

**NOTE** If a voting response is moved out of the **Inbox**, the response is not automatically tracked in the original message.

[Top of Page](#)

## Meeting requests, task requests, and documents

Meeting requests, task requests, and documents are treated as messages. For example, when you create a rule that moves **items** (**item: An item is the basic element that holds information in Outlook (similar to a file in other programs).** **Items include e-mail messages, appointments, contacts, tasks, journal entries, notes, posted items, and documents.**) with the word "meeting" in the **Subject** box to a specific folder, any task request or meeting request that meets that condition is moved as well. However, keep in mind the following limitations when you create rules that affect these types of items:

- An item moved to a nonmail folder might not work as you expect after it is moved. For example, if a message is moved to the **Calendar** folder, a new appointment is not created.
- If a meeting or task response is moved to the **Deleted Items** folder by using a rule, the response is not tracked by the original item.
- If a meeting request is automatically moved to the **Deleted Items** folder, the meeting is not added to the **Calendar**.
- Rules that affect messages that you send are not applied to task requests and meeting requests.

[Top of Page](#)

## Distribution lists

A new rule for a distribution list will behave differently depending on how you create the rule:

- **Move messages sent to a distribution list to a folder** If you choose this rule template, only messages that are sent to the distribution list are moved to the specified folder. Messages from individuals who happen to be on the distribution list will not be moved to the specified folder.

**NOTE** This rule works only for Exchange accounts.

- **Move messages from someone to a folder** If you choose this rule template, messages from any individuals who are members of the distribution list that you specify are also moved to the specified folder.

[↑ Top of Page](#)

## Forwarding messages outside your organization

If you work in an organization that uses [Exchange](#), by default, messages you forward to external e-mail addresses outside your organization using a rule will not be sent. This setting is to help prevent corporate data from being disclosed and is controlled by your Exchange administrator.

[↑ Top of Page](#)

## Related Office Online discussions

Read related questions and answers from other Microsoft Office customers.

---

- [↓ Can i create a rule to save an attachment from a specific sender?](#)
- [↓ Difference between forward and redirect in the rules wizard?](#)

© 2009 Microsoft Corporation. All rights reserved.