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

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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.

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.

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.
3. If you have more than one e-mail account, in the Apply changes to this folder list, select the Inbox that you want.
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**.

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**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**.

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**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?

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:


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.

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.

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.

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.

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.
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.

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- Difference between forward and redirect in the rules wizard?