**RULES AND ALERTS**

It is possible to instruct Outlook to evaluate a message and to make a decision about what to do with the message. Rules can be created that process messages as they arrive or as they are sent. This can be done by checking names, word, attachments, categories, or other message conditions. After the message has been evaluated, Outlook can automatically move the message, copy the message, delete the message, forward the message, redirect the message, reply to the message, or process the message in some other way. This is accomplished by using the Rules Wizard. All rules are summarized in a list. They are differentiated by icons that indicate what they do. To create a rule using the Rules Wizard follow the instructions in this document.

**START THE RULES WIZARD**

1. Click the File Tab.
2. In Backstage View, on the Info Tab, click the Manage Rules & Alerts button (see illustration below). Depending on the size of your monitor, it may be necessary to scroll down the page.

The Rules and Alerts dialog box will appear (see illustration below).

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**Rules and Alerts**

Use Rules and Alerts to help organize your incoming e-mail messages, and receive updates when items are added, changed, or removed.

- **E-mail Rules**
- **Manage Alerts**

<table>
<thead>
<tr>
<th>Rule (applied in the order shown)</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Received from 'The Rapid elearning Blog'</td>
<td>[Icon]</td>
</tr>
<tr>
<td>Sue Walberg</td>
<td>[Icon]</td>
</tr>
<tr>
<td><a href="mailto:bounce-13006657@emailtjuego.net">bounce-13006657@emailtjuego.net</a></td>
<td>[Icon]</td>
</tr>
<tr>
<td>eSchool News</td>
<td>[Icon]</td>
</tr>
<tr>
<td>Personal (client-only)</td>
<td>[Icon]</td>
</tr>
<tr>
<td>Clear categories on mail (recommended)</td>
<td>[Icon]</td>
</tr>
<tr>
<td>John Anderson</td>
<td>[Icon]</td>
</tr>
</tbody>
</table>

**Rule description (click an underlined value to edit):**

Apply this rule after the message arrives from 'The Rapid elearning Blog'.
move it to the Rapid elearning folder and stop processing more rules.

- [ ] Enable rules on all messages downloaded from RSS Feeds

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OK  Cancel  Apply
Click the New Rule button.

The first page of the Rules Wizard will appear (see illustration below).

The option Start from a template or from a blank rule will be selected.

Take a moment to look over the types of rules that can be created from a template.

In the Select a template list, click Move Messages from someone to a folder.

Click Next.

**USE A TEMPLATE**

This portion of the Rules and Alerts allows you to use a Wizard to create a Rule or Alert.

In Step 1: Select a Template list, click the different options to see what each template does (see illustration above).

Under Stay Organized, click one of the Rules options.

The Step 2 options will change with each of the Step 1 templates.

The underlined words in the description (Step 2) are values that must be specified to complete the rule.

Click on the link in the Edit the rule description box.

The dialog box pertaining to that Rule will appear.

Once all the selections have been made, click the OK button.

The Rule Description box should be updated to reflect the Rule specifications.

Click the Next button.
**Specify Conditions**

- In the **Step 1: Select Conditions** list, click the different check boxes to see what each condition does (see illustration below left).
- More than one condition can be specified for each rule.
- Select any additional options that might apply to this rule.
- In the **Step 2: Edit the Rule Description** area; click the links to specify the conditions for the rule.
- Click each of the underlined areas within the Step 2 box.
- A dialog box will appear where the specifics for the rule may be specified.
- Click the **Next** button.

**Specify Additional Conditions for the Rule**

This step in the wizard is used to specify what should happen to the message. A check mark will appear in the box for the option that was specified in Step 2 of the previous window.

- In the **Step 1: Select Actions** list, click the different check boxes to see what each action does (see illustration above right).
- More than one action can be specified for each rule.
- Select any additional options that might apply to this rule.
- In **Step 2: Edit the rule description**; click the link to specify the criteria for the action.
Click the Next button.

**Specify Exceptions to the Rule**

- The Exceptions window of the Rules Wizard will display (see illustration below left).
- In the Select Exception(s) list, look at the different options that are available.
- Click any of the options in the list of actions.
- The exception will appear in the Step 2: Edit the rule description area.
- Specify the criteria for the exception.
- The Edit the rule description box will be updated to reflect the selection.
- Click the Next button.

**Finishing Rule Setup**

- The Final Page of the Rules Wizard will display (see illustration above right).
- Specify a name for the rule or accept the default name.
- Select the Run this rule now on messages already in "Inbox" check box if you want the rule to run immediately.
- Make sure the Turn on this rule box is selected.
- Click the Finish button.