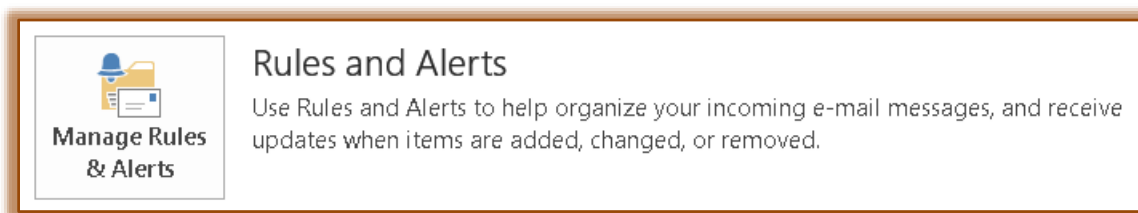


## RULES AND ALERTS

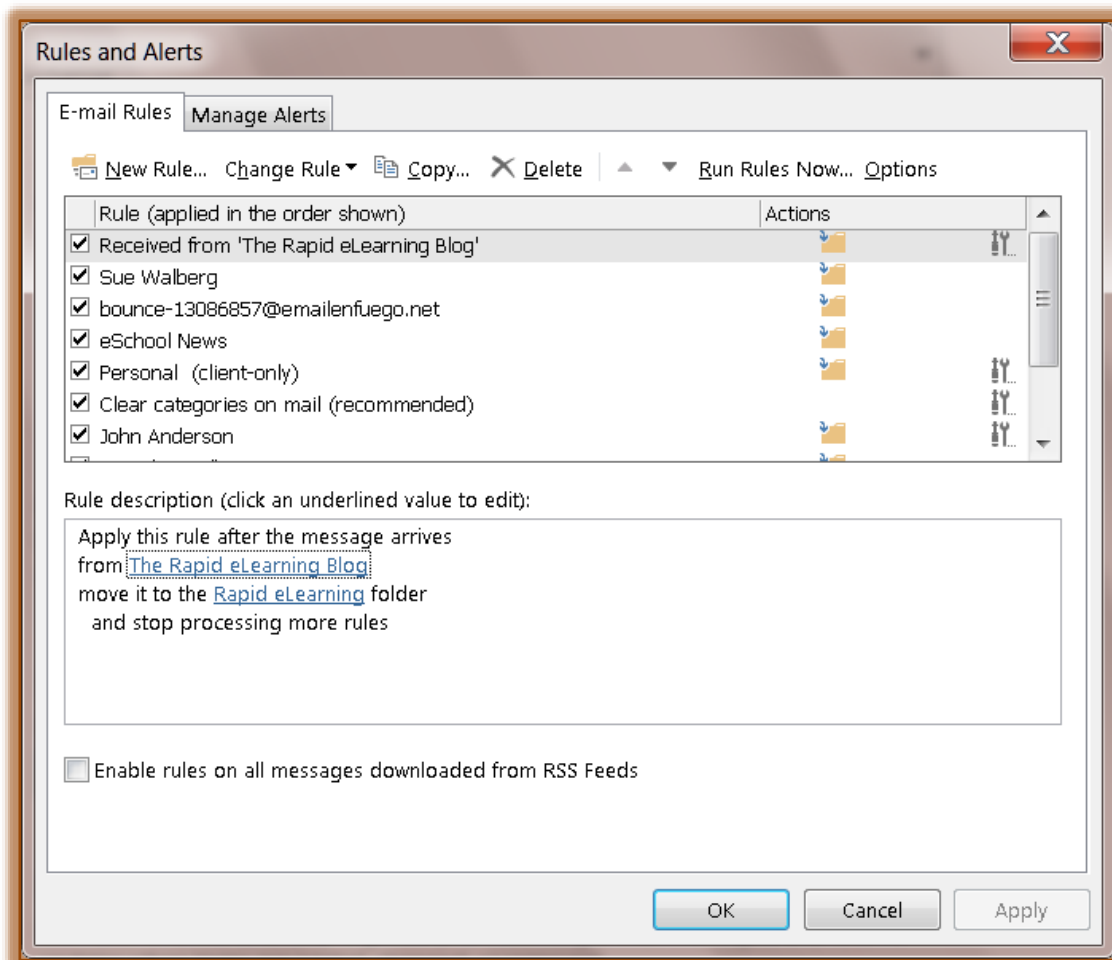
It is possible to instruct Outlook to evaluate a message and to make a decision about what to do with the message. Rules can be created that process messages as they arrive or as they are sent. This can be done by checking names, word, attachments, categories, or other message conditions. After the message 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

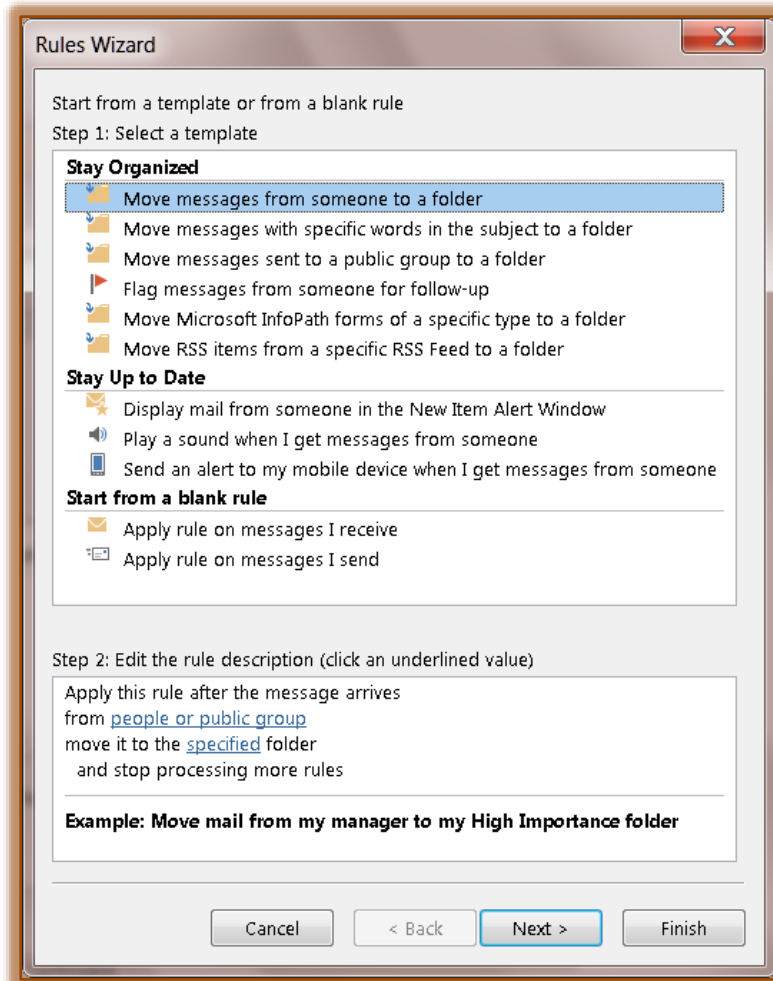
- ✦ Click the **File Tab**.
- ✦ In **Backstage View**, on the **Info Tab**, click the **Manage Rules & Alerts** button (see illustration below). Depending on the size of your monitor, it may be necessary to scroll down the page.



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



- ✚ 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**.

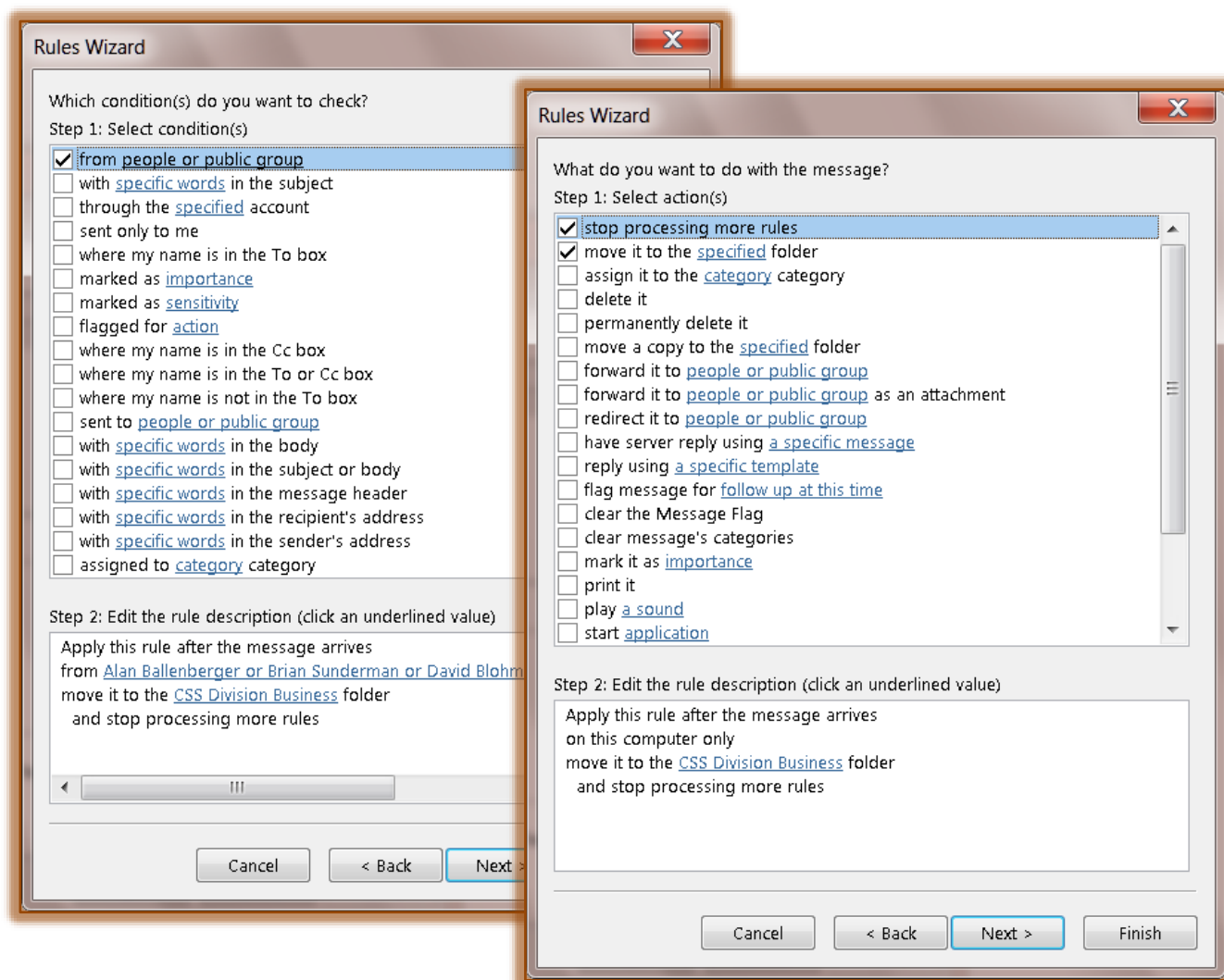
### USE A TEMPLATE

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.

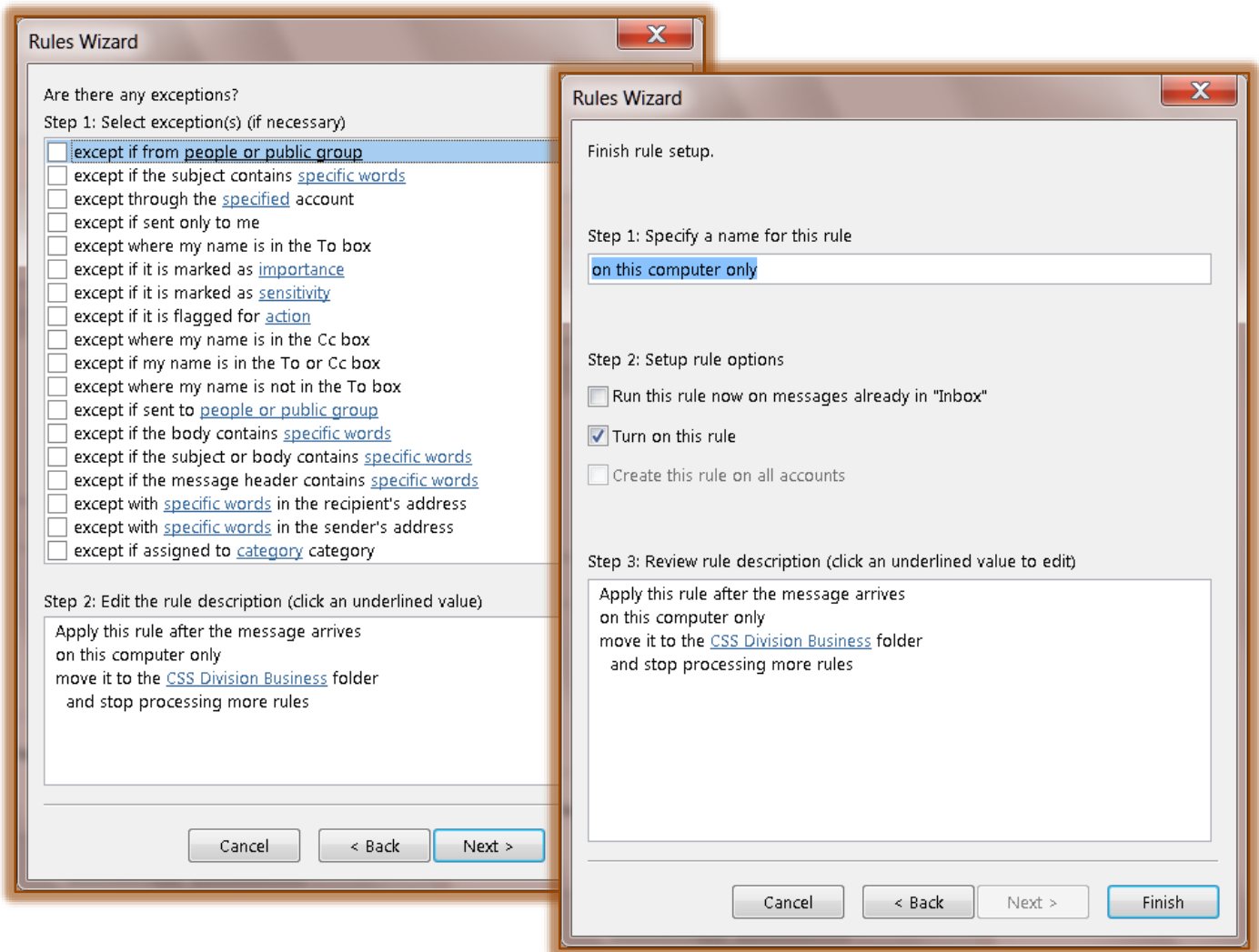
✚ Click **any** of the options in the list of actions.

✚ 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.

✚ The **New Rule** will appear in the **Rules and Alerts** dialog box.