

What is a Rule in regards to Email?

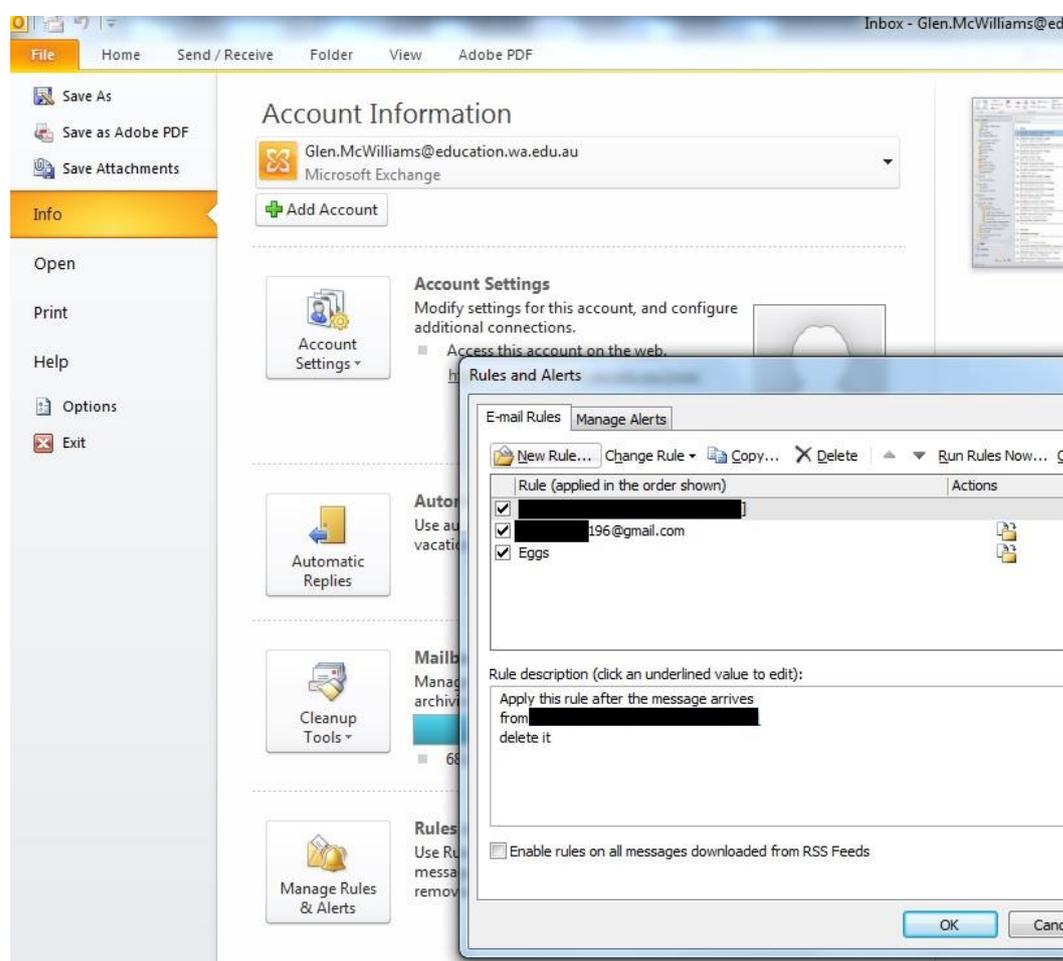
A rule is where you can specify any incoming or outgoing mail to behave in way where you would normally need to do it manually. The Rule does it automatically, therefore saving you time, much the same a Macro does in Excel or Word.

An example of seeing Rules that were created, is displayed below.

The first Rule in my list is blacked out in this sample, no one needs to know what it does.

The second Rule receives emails from the Log a Job web page and redirects emails to a folder named Helpdesk which is located in my Inbox .

The third Rule gets any emails in regards of Eggs for sale and permanently deletes them without me needing to read or delete the email. I have been egg free of emails for more than 12 months.



So, how do we create Rules?

Read on, and I will show you how, but this is for Outlook users only. Webmail has Rules too, but not in the vast set of Rules you can create in Outlook.

Most email software have a way of creating Rules, it just may take a little reading.

Making Rules and Changing the Rules (go outside the box)

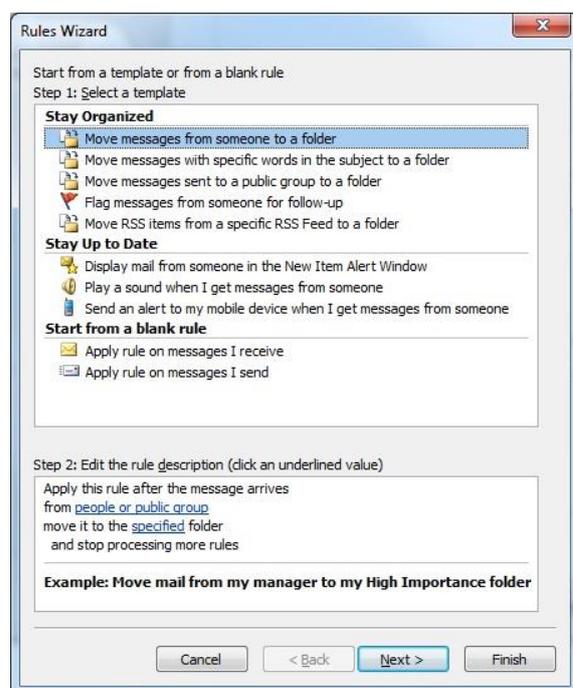
As you can see in the previous image, I went to where it says File in my Outlook and then you may have guessed I clicked on “Manage Rules & Alerts”.

In this example here, I was planning on showing you how to make a Rule for one or two senders, but Callie Djukic (an excellent thinker) just dropped in and said, “great, does that mean I don’t have to get the Tindale email?”

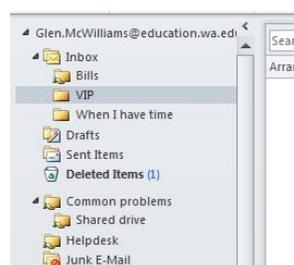
So now we will create a Rule using the Rules Wizard Template to redirect incoming messages to a new folder in my Inbox. Then, we will create a Rule without using a Template that will show you how to filter Tindale or MET emails.

Once at the Rules and Alerts window, click on New Rule...

Now we are brought to the Rules Wizard, the image below.



While you weren’t looking, I created a new folder under my Inbox and called it VIP, see below for the example.



Okay, let's continue.

From the Rules Wizard box, select "Move messages from someone to folder", then click Next at the bottom of the box.

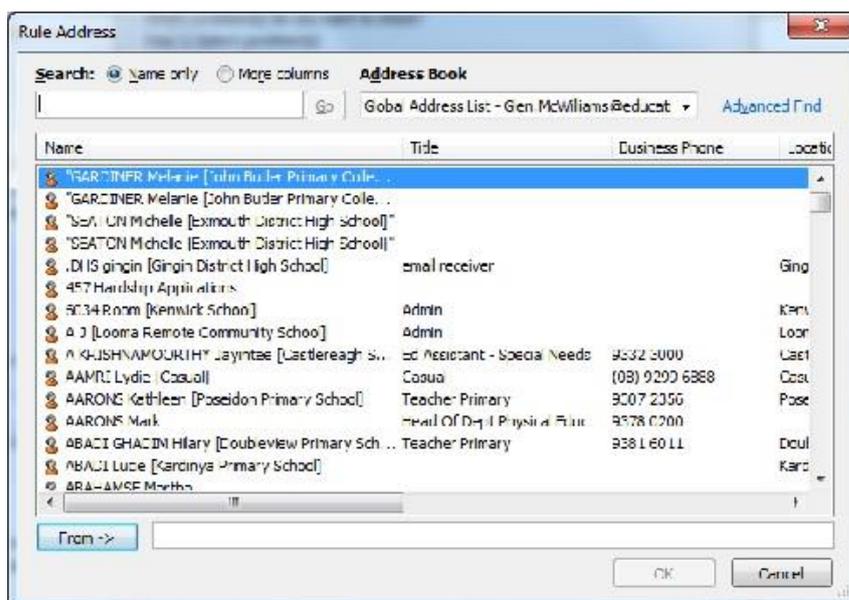
Your new window should look like this image below, except I have removed some of the top of the whole window, we now only want to concentrate on the Step 2, as you can see below.

In your window, you will notice that Step 1 has been completed and there is a checkmark next to "from people or public group".



In this Step 2 section, we need to select who or what group of people we want to apply this Rule to, so we click on 'people or public group' in the Step 2 window.

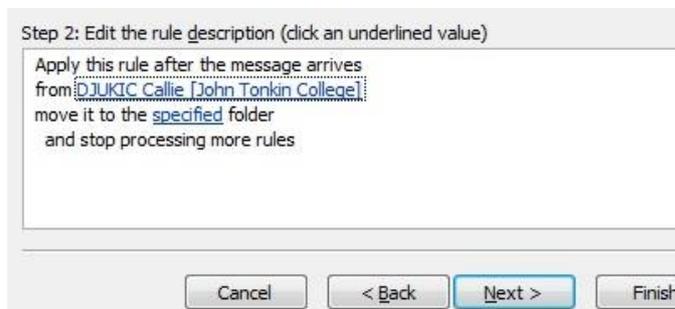
This should now give you the next image, one we have probably seen many times, but with a new word in the bottom left corner.



The word in the bottom left is From and not To and we usually use.

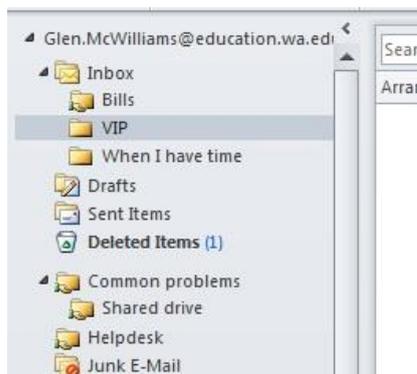
Find your sender(s) email address(es) and then click on the OK button.

You should now come back to the Rules Wizard window but your intended captured email addresses should be visible in the Step 2 part of the window, like mine in the image below.



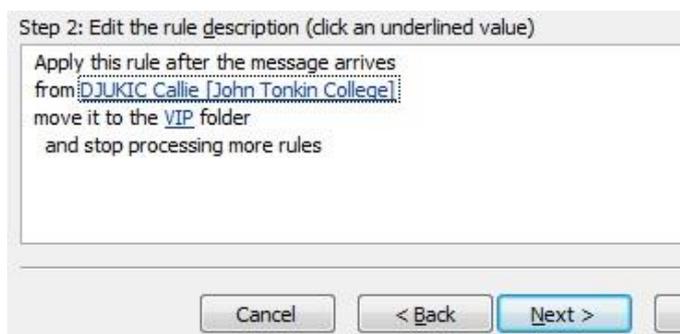
If you haven't already created a new folder where you want the intended incoming emails to redirect to, don't worry, you can always send it somewhere else, then create a new folder, and come back and change this Rule to where it points.

Next step, click on where it says 'specified' and you should get an image like the image below.



Select the folder you want the messages to go into and then click on OK.

Now you should get the Step 2 final window, like below.



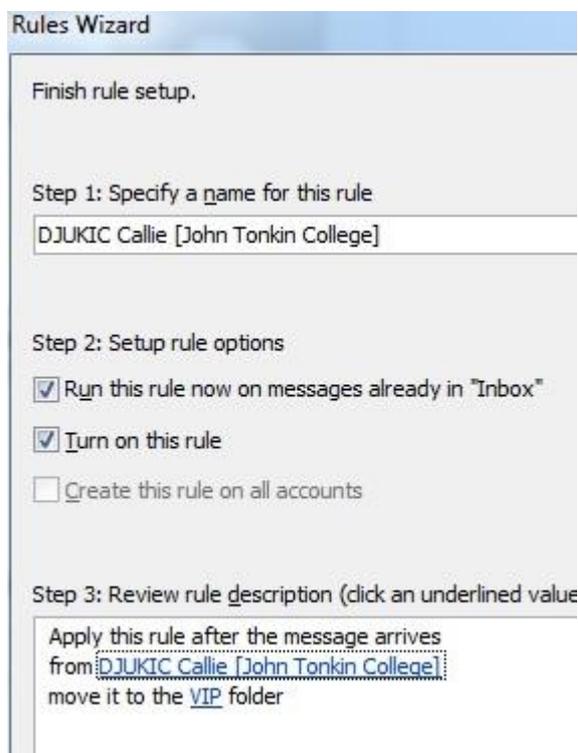
Click Next to continue, and another window will open like the next image.



In the image above, you will see there are lots of choices, but here for this example, we are only going to leave the 'move it to specified folder' checked, then click on Next at the bottom of the window.

Another window will appear, which shows Exceptions, ignore that for now and click on Next.

Now you should have the next image like this one below.

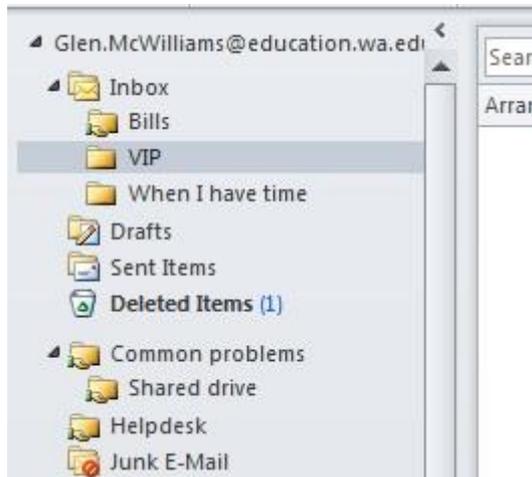


You can give your Rule any name you want, and notice how I added another checkmark that displays as 'Run this rule now on messages already in the Inbox'.

When happy, click OK and go back to your Inbox to test our Rule.

Testing the Rule

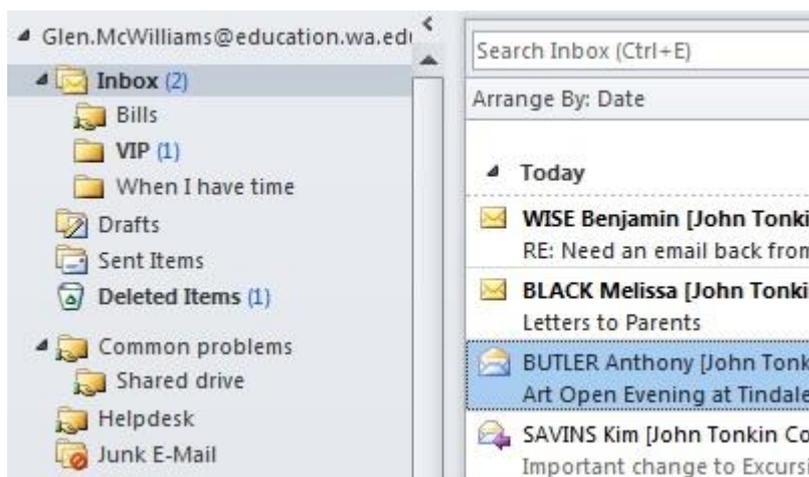
Back at our Inbox, and looking at my VIP folder, I see there is no new messages as you can see below in my image.



Now I am going to send an email, one email to both Callie and Ben Wise, hoping that we will see a difference in the Inbox and the VIP folder.

You can take a break now, it may take a while for a response back from both Callie and Ben.

Intermission is over, Callie finally responded, but Jill Walker had to go for a quick run to her office to tell her that I am waiting for a response and that she is holding up our learning process.



As you can see from the image above, three new messages plus the existing new message in the Deleted Items folder (another Rule).

But from the three new messages, two are in the Inbox while one went to the VIP folder without any interaction from me, therefore it has to be from Callie Djukic.

Adding a new Rule for types of messages

Now, let's go and create the bulk Rule for Tindale, but remember, you can do this for MET or any other group.

I am not going to show a lot of images here, just the ones you don't know about yet.

Get yourself to the Rules Wizard window.

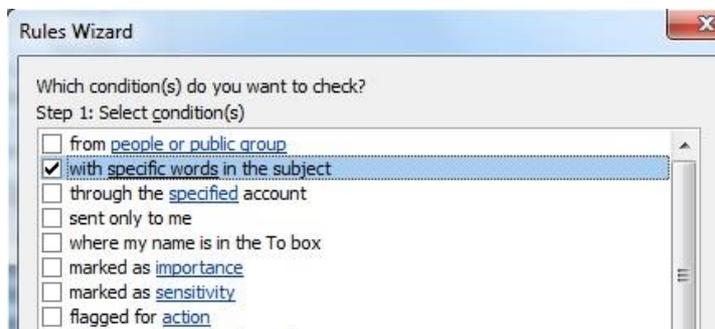
Not sure how, then start from the beginning, once done a couple of times, it becomes very easy and you can experiment with other Rules.

At the Rules Wizard window, go down to the 'Start from a blank rule' and then click next, like the image below.

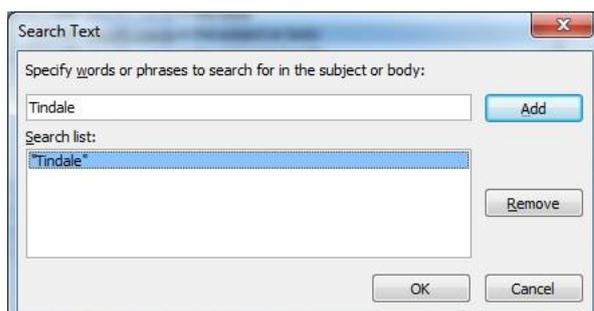


Next you will be taken to the 'Which condition' window.

Choose the condition that displays 'with specific words in the subject', like the image below.



Now click on the text that says 'specific words' in the Step 2 part of the window and you should get an image like the one below, where I have previously entered Tindale to the image.



As you can see from the previous image, to add Tindale as part of the subject title, you just type in Tindale and click on Add.

You can enter more words here if you like, but the more you have, the less emails you receive or less likely to filter out your incoming emails.

Once you are happy with your selection of word(s), click on OK.

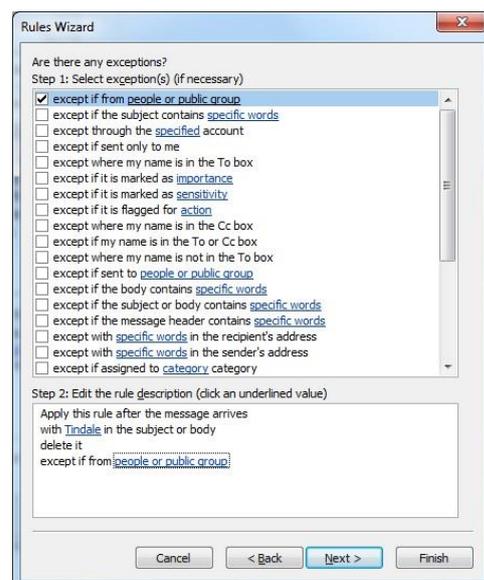
You should now be at the window similar to this image below.



As you can see from the selections above, there are some good choices which include 'permanently delete it'. Choosing this, you will never know that you have received and deleted the email, just like my Eggs Rule.

My advice is, unless you are absolutely sure you won't need to glance at an incoming email, use the 'permanently delete it', but if you are not sure, just select 'delete it' or 'move to a specified folder' as we did with our first Rule.

When happy with your choice, click on Next and you will be taken to the Exceptions window. This can be handy when you want to delete or move all messages in regards to a subject name, but not if it is sent from certain people. The Exceptions window looks like the image below.



Click on the 'people or public' group in Step 2 above to add emails not to filter.

If you have or don't need to choose any staff for filtering, then click on the Next button.

You should now be at the window where you give your Rule a name and whether or not you want to run this new Rule on existing items in your Inbox.

Click OK when you have chosen a name, go back to your email's Inbox, and if you created a new Rule, don't be surprised to see unread new messages now sitting in your designated folder or the 'Deleted items' folder.

Create more Rules, the more you have, the better to manage your emails.

This was a guide for Microsoft Outlook only, but it is similar to many other email software.

Enjoy 😊