

Creating a Rule

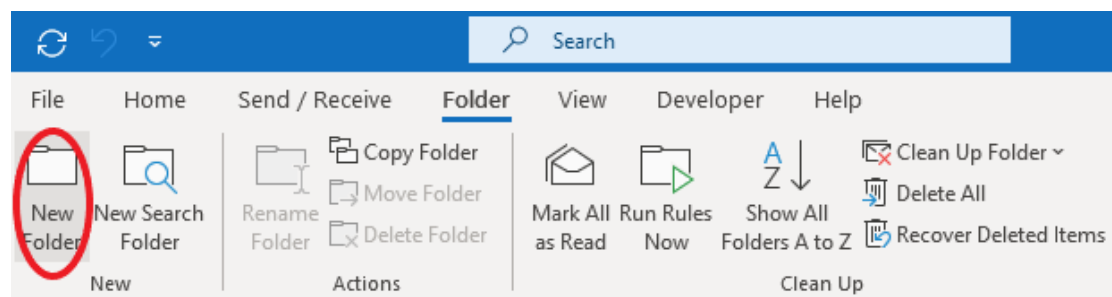
Purpose

Rules are an efficient way to automate actions on messages sent to your account. Using rules effectively will help with managing your information, making it easier to discover message types and get rid of unnecessary clutter. They will also clear out your default Inbox folder, promoting an efficient workflow.

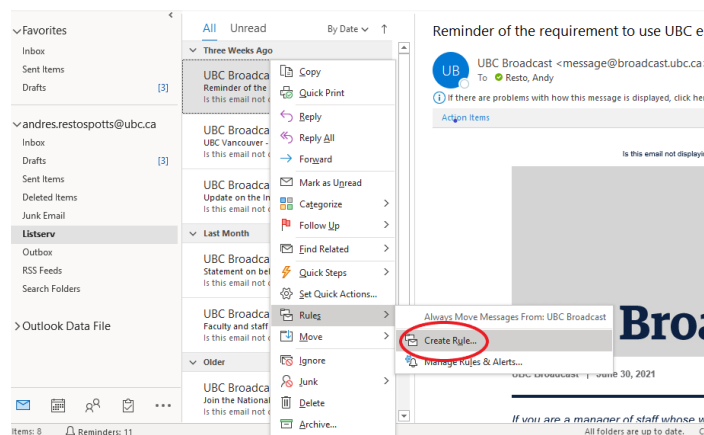
The example presented below involves sending all messages from listservs into a custom folder in your account. You could then go and manually delete messages in the folder every 90 days or see our guide on *Creating Retention Rules Using AutoArchive* to automate destruction.

Walkthrough

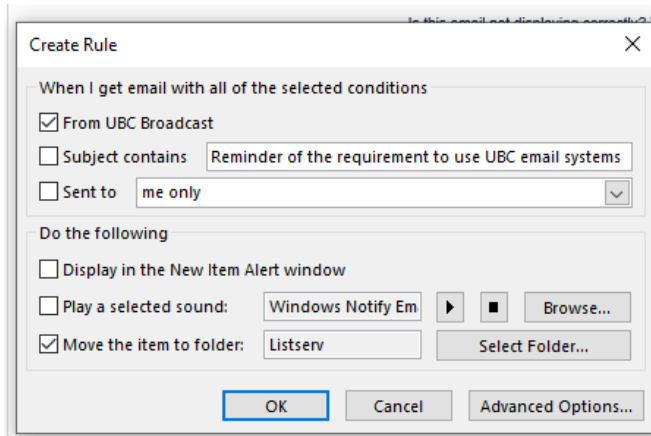
1. Create a folder by selecting Folder from the top navigation bar and clicking New Folder. Name the folder "Listserv". In the following steps we will be showing how to automatically send all messages from specific listservs into this custom folder.



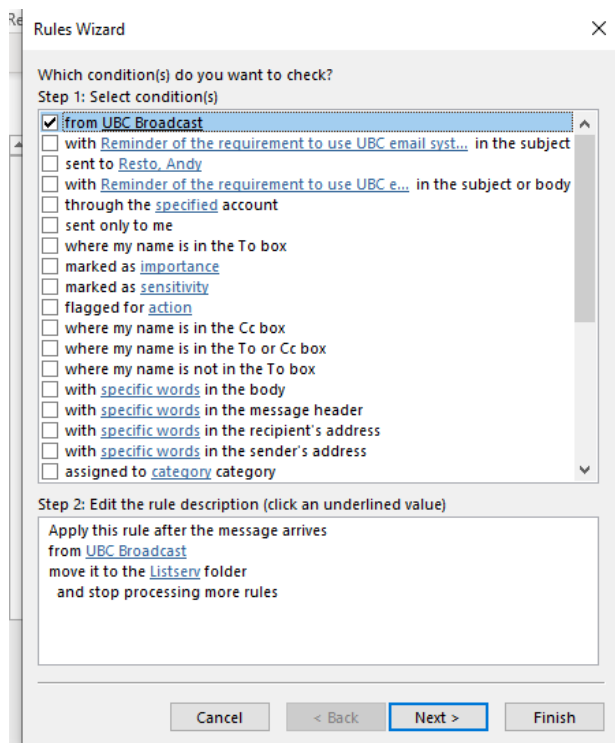
2. Right click on a message you would like to set a rule for, scroll down the options and select "Rules" – "Create Rule".



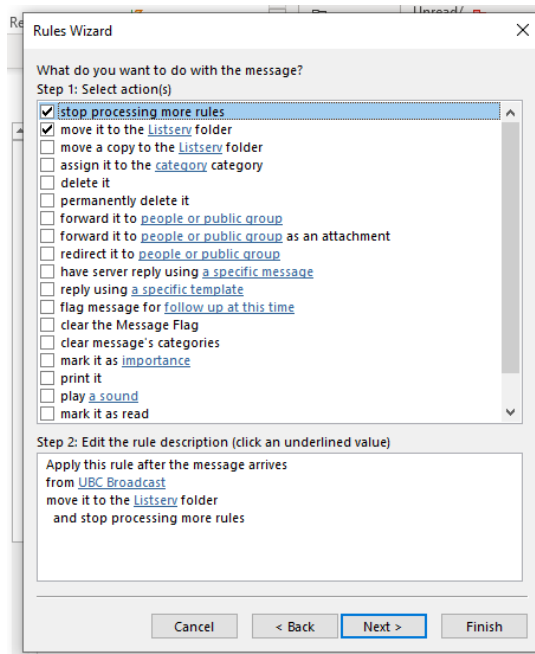
3. A box will appear with basic options. First choose what kind of email this rule will apply to – who is it from, subject information, and who is it sent to. Then select what action to perform on the email. In this case we are sending all messages from “UBC Broadcast” to our newly created “Listserv” folder.



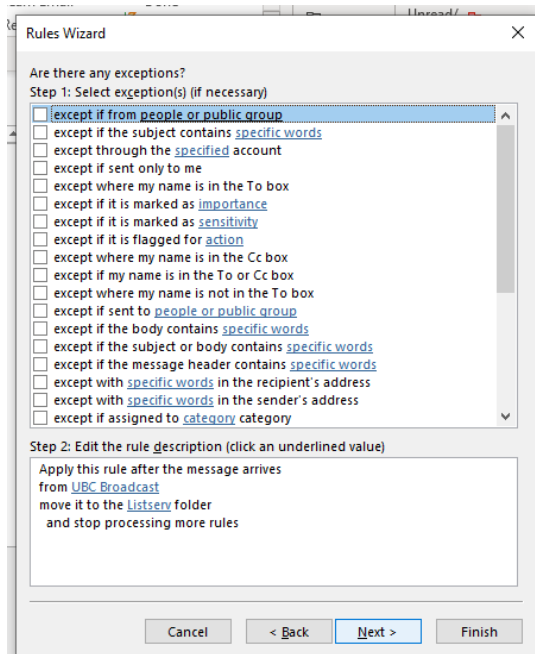
4. Selecting “Advanced Options” will give you greater control over how the rule operates. The first page will give a list of possible conditions to set regarding the received message.



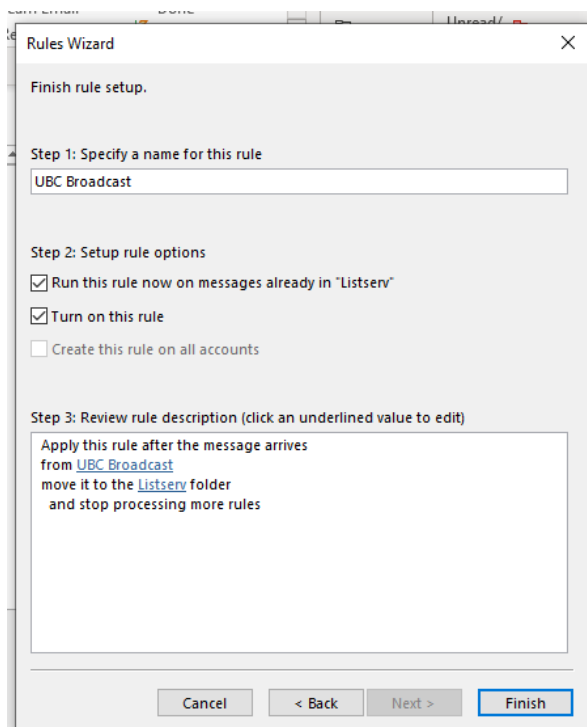
5. Next, you will select the actions you would like performed on those messages. Options include moving, copying, deleting, forwarding, and more.



6. You are then given the option to provide any exceptions to the rule. In the example provided here for listserv messages, it may be valuable to keep messages in your inbox that are specifically addressed to you or mention you by name, for example.



7. Finally, create a name for this rule and choose to either run it for everything that already exists or starting now.



Examples

Some examples of other rules that could be beneficial:

- Assigning emails from specific accounts or with specific subjects to categories. Using categories can help prioritize and/or organize your mailbox. For example, you can use the default colour categories in Outlook to separate messages by high, low, or medium priority to help guide your workflow.
- Filtering messages where you are cc'ed as opposed to the primary recipient.
- Send automated messages to the trash or to a review folder (e.g., software updates).