

Creating a Rule

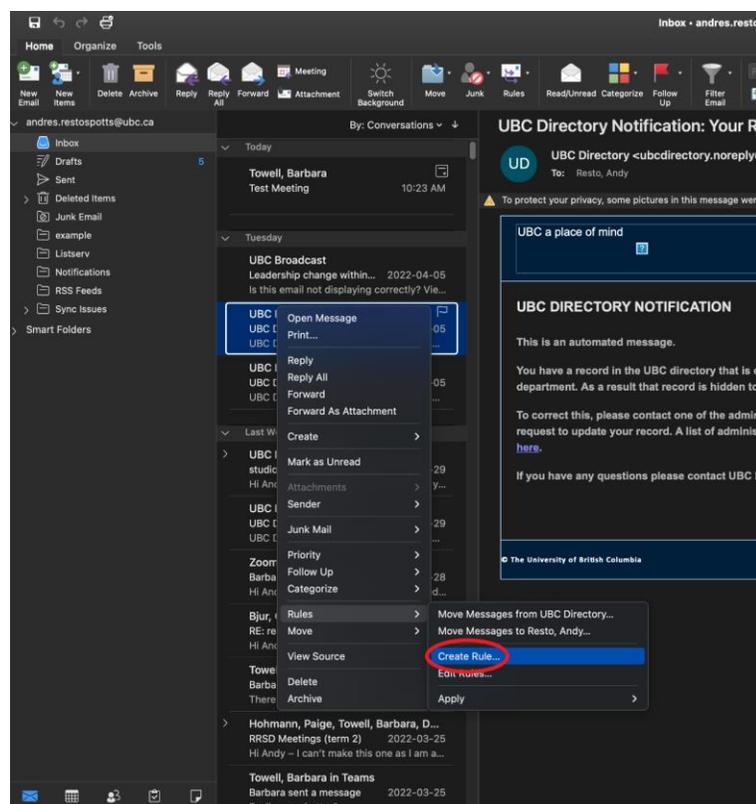
Purpose

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.

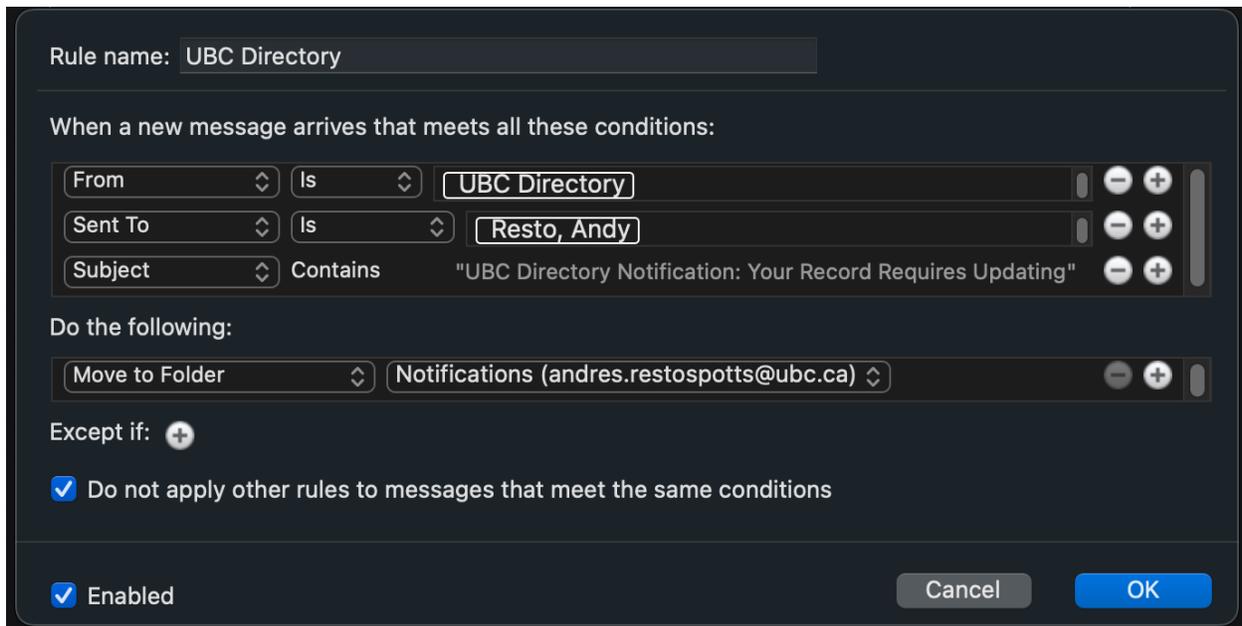
The example presented below involves sending automated notification messages into a custom folder in your account. Since these messages are transitory, you are able to manually delete all messages in the folder every 90 days.

Walkthrough

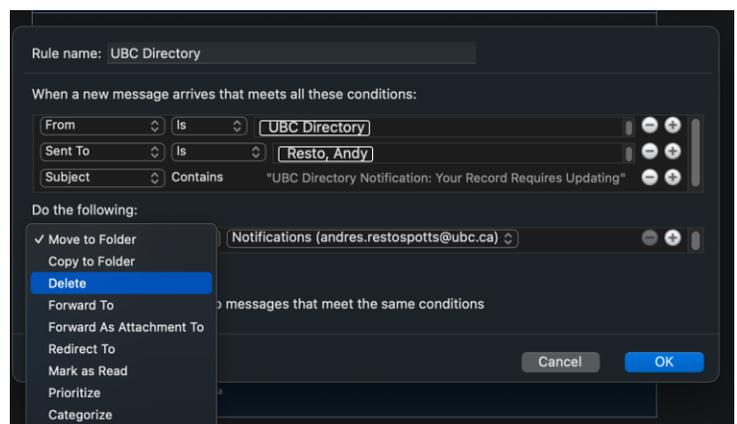
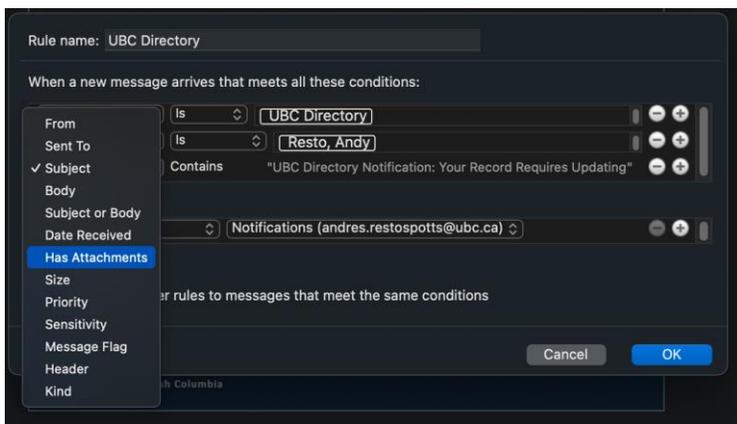
1. Create a folder by selecting New Items from the top navigation bar and clicking Folder. Name the folder "Notifications". In the following steps we will be showing how to automatically send notification messages into this custom folder.
2. Right click on a message you would like to set a rule for, 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, who is it sent to, and subject information. Then select what action to perform on the email. In this case we are sending all messages from “UBC Directory” to our newly created “Notifications” folder.



4. To see other options for message conditions, actions to be performed, or exceptions to the rule, click on the arrow symbols for an expanded list as seen below.



5. Create a name for the rule at the top of the box, and select “Enabled” at the bottom to ensure the rule begins operating immediately. Then select “OK” to apply the rule.

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.
- Sending messages from subscriptions or listservs to a customized folder.