

*Microsoft Outlook*  
*2003*

*Creating Rules*



*Created by*  
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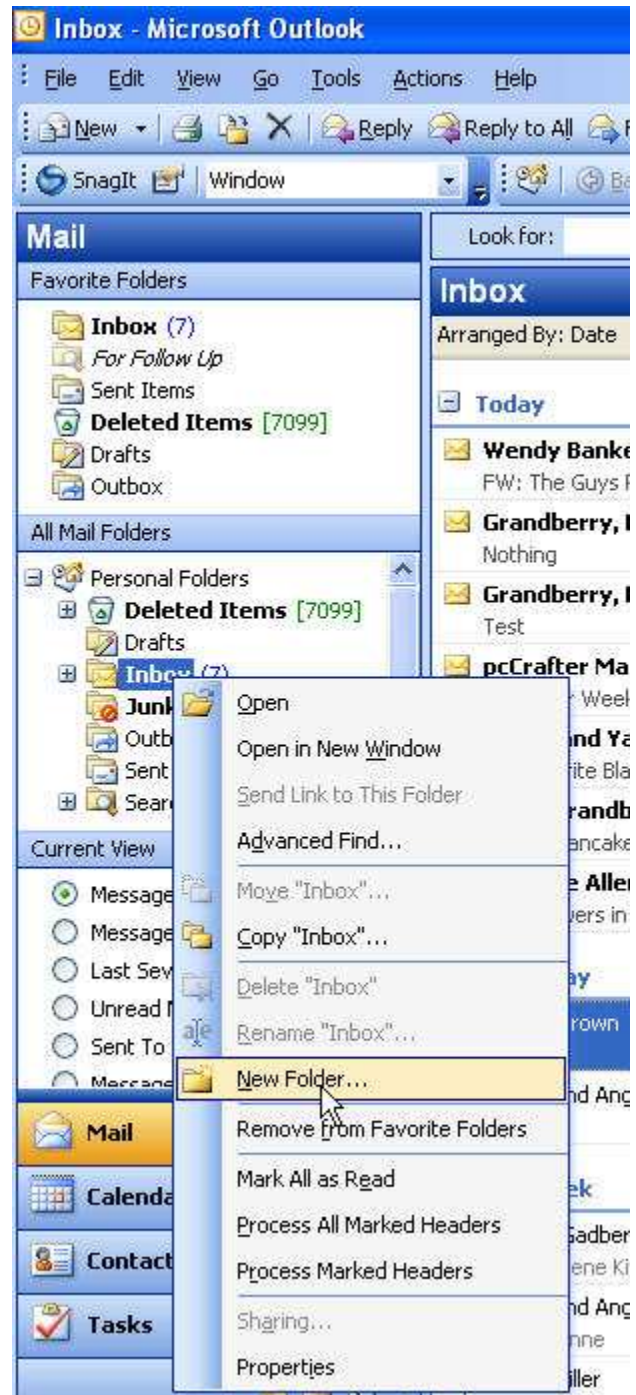
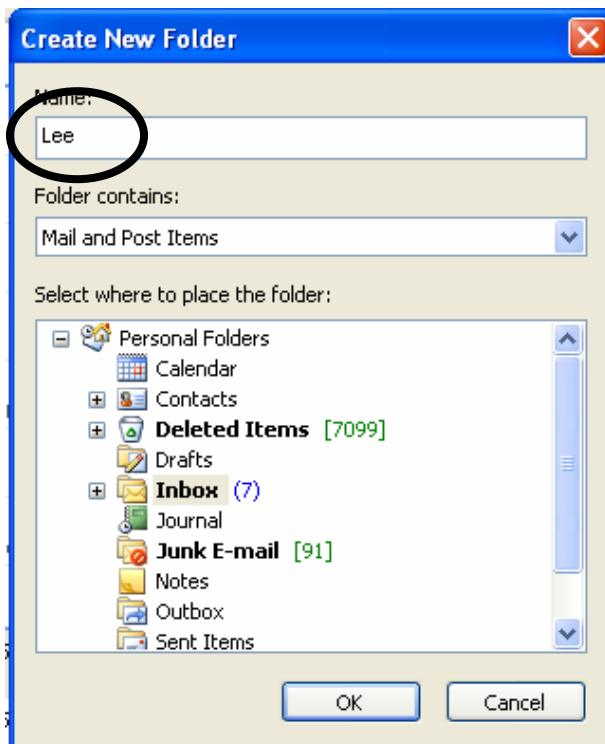
# INTRODUCTION

This process is very simple and you should be able to create a rule in a few short minutes by following these steps. This demonstration will set a rule to move all e-mail from one particular person into a special folder.

## Preparation

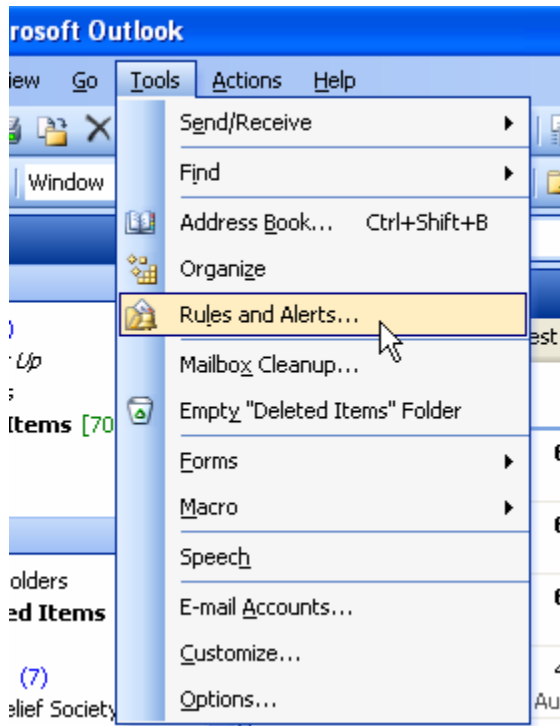
You will need to begin by creating a folder in Outlook.

- **Open** Outlook
- Be sure you can see the Inbox folder
- **Right click** on the Inbox folder
- Select **New Folder**
- Give the folder a name. For this demonstration, I will name my folder **Lee**

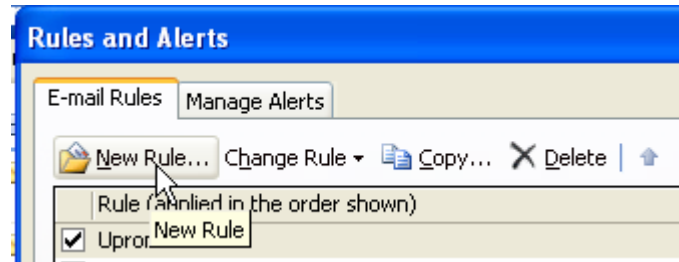


## Create the Rule

Now that you have created a folder to use in the rule click on **Tools, Rules and Alerts**.

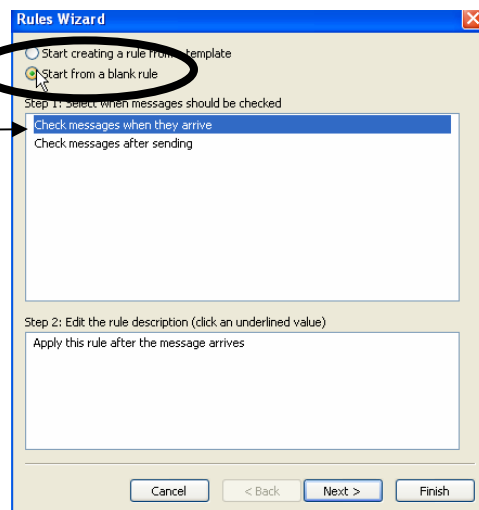


In the Rules and Alerts Window click on **New Rule**.



Click on **Start with blank rule**

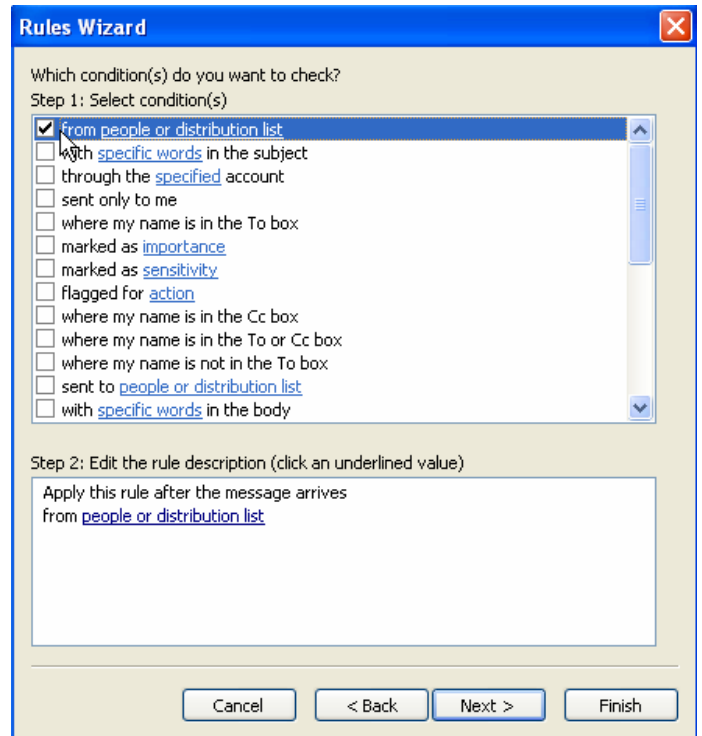
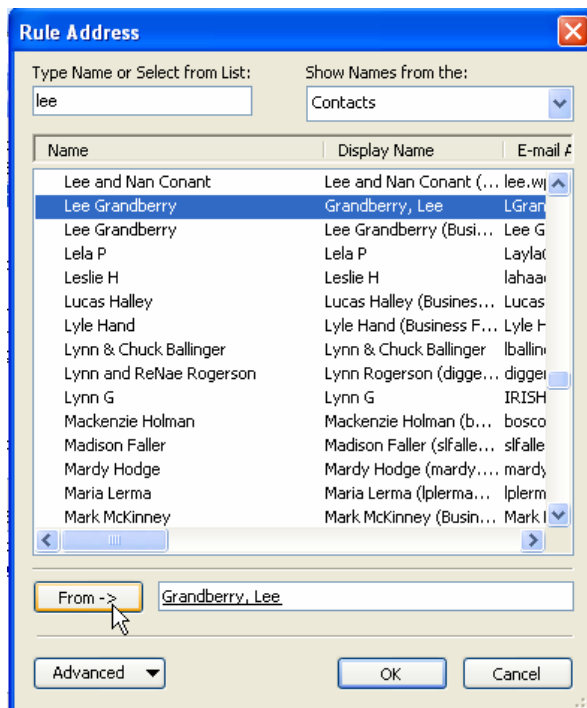
Be sure **check messages when they arrive** is highlighted and click on **Next**



Put a checkmark next to **from people or distribution list**

In the bottom window click on **people or distribution list**.

This window will pop up with your contacts in it



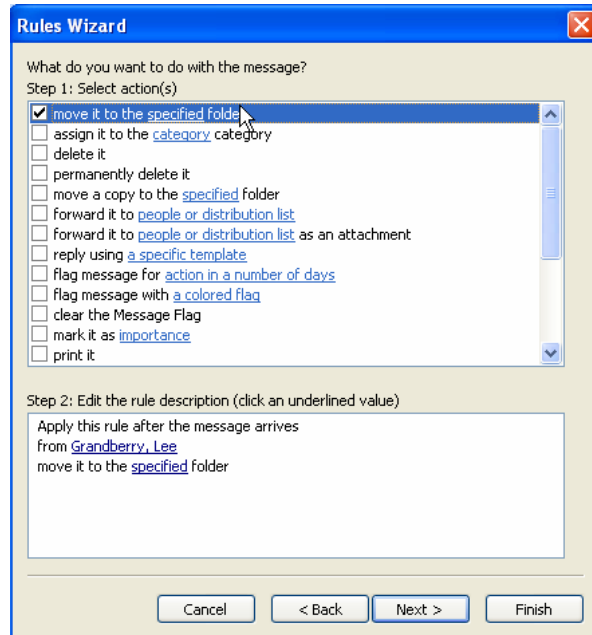
Find the person who will be sending you e-mail that you want moved into your folder.

After highlighting their name, click on **From** and then **OK**.



Now, you will be back to the Rule window. Put a checkmark in the box next to **move it to the specified folder**.

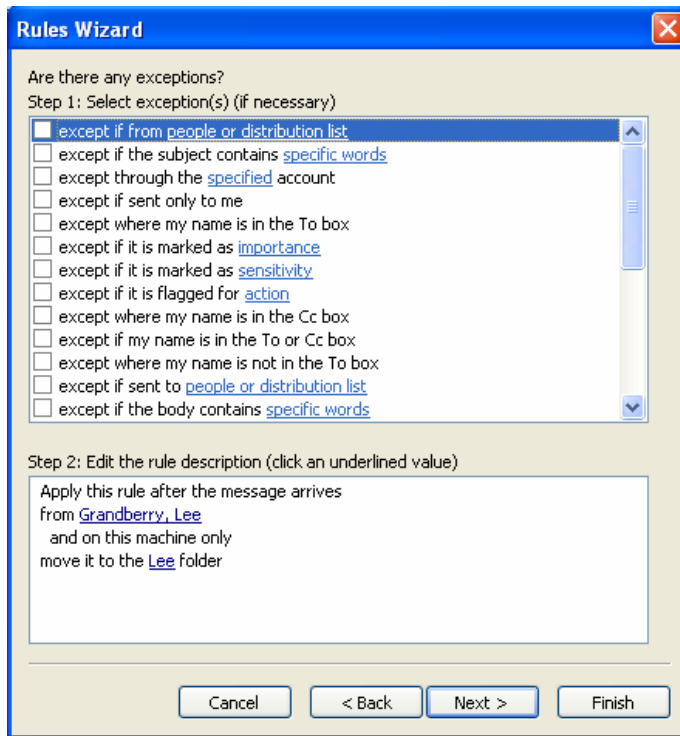
Notice that both options you have chosen are now in the bottom window.



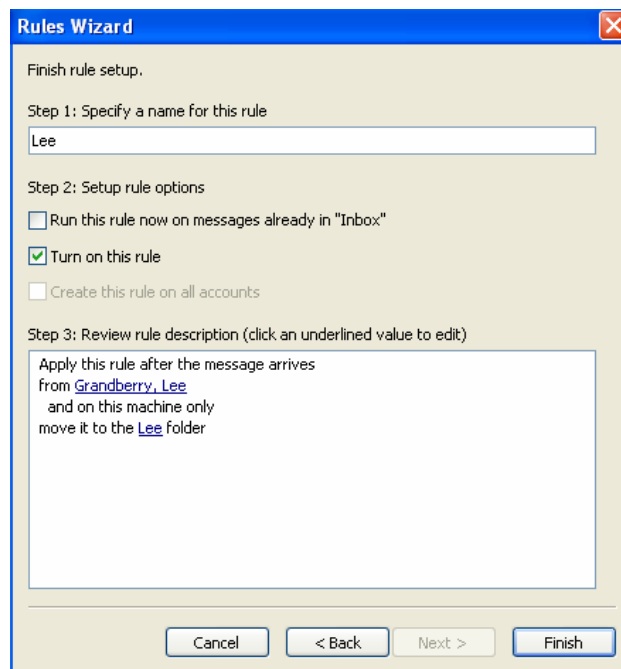
Now you can select the folder you just created. Click on **move it to the specified folder** in the bottom box. Find the folder you created and click on OK.



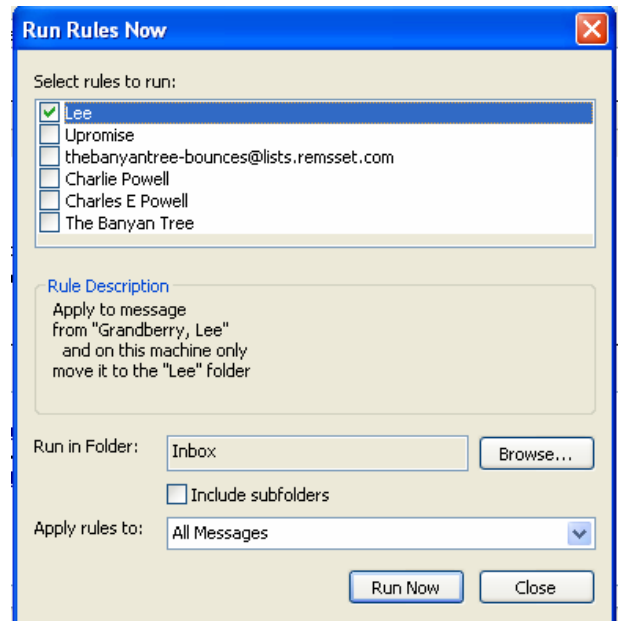
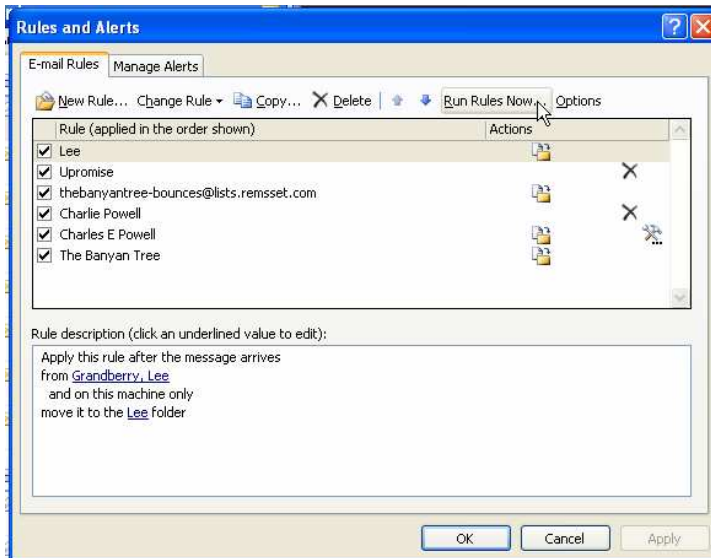
The next set of windows allows you to refine the rule. First, you can set exceptions, if the e-mail has a specific word in the subject, or if it's marked important or some other exception. For this demonstration, there are no exceptions. You will simply click on **Next**.



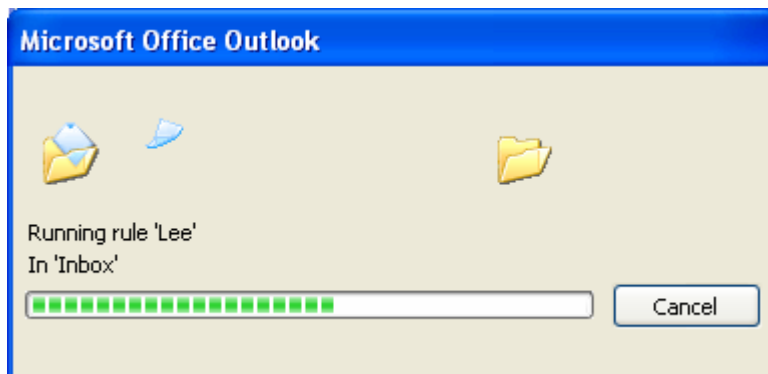
Give the rule a **name** and click on Finish. Now, all messages from Lee will automatically be moved into my folder named Lee and I can read them all in one place.



You will be brought to the Rules and Alerts Window again. To run the rule immediately, click on **Run Rules now**. Place a checkmark next to any rule you want to run and click on Run Now



You will get this processing window



After the rule is processed, click on Close and then click on OK. From this point on the rule should run automatically.

## Troubleshooting

If you find the rule does not work, go back to Tools, Rules and Alerts and see if there is a checkmark next to you rule. If there is no checkmark the rule will not run.

