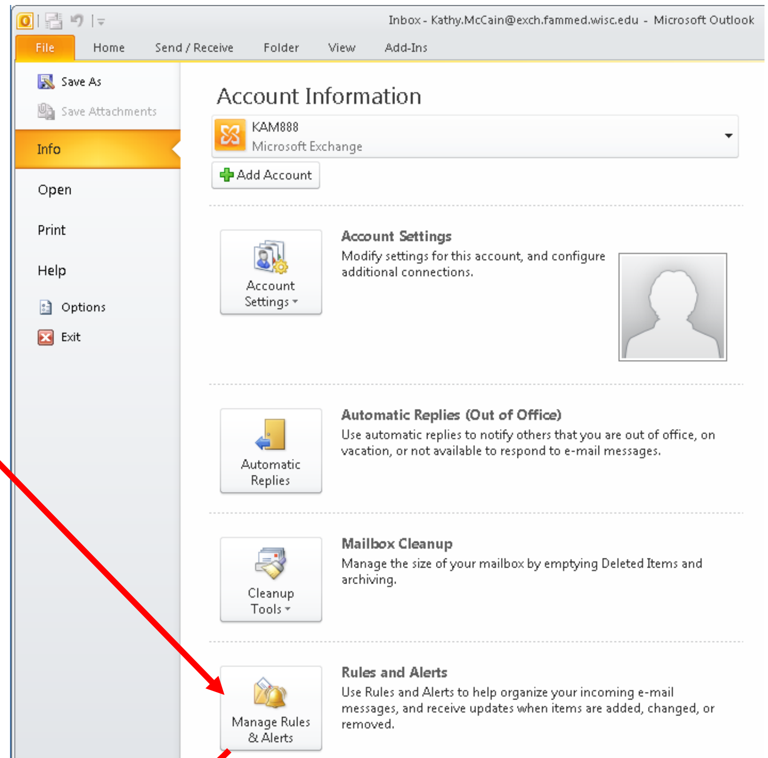
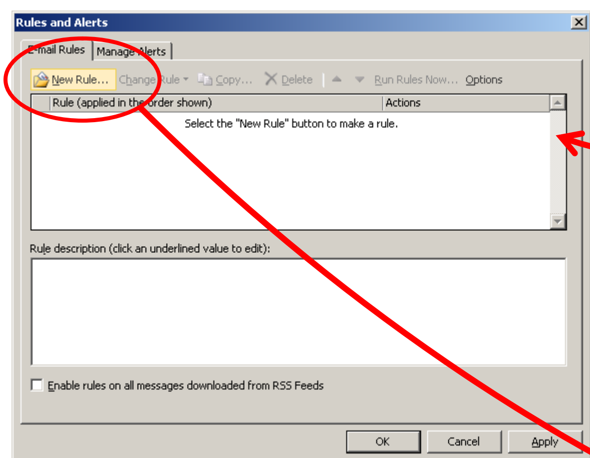
Applying Mailbox Rules

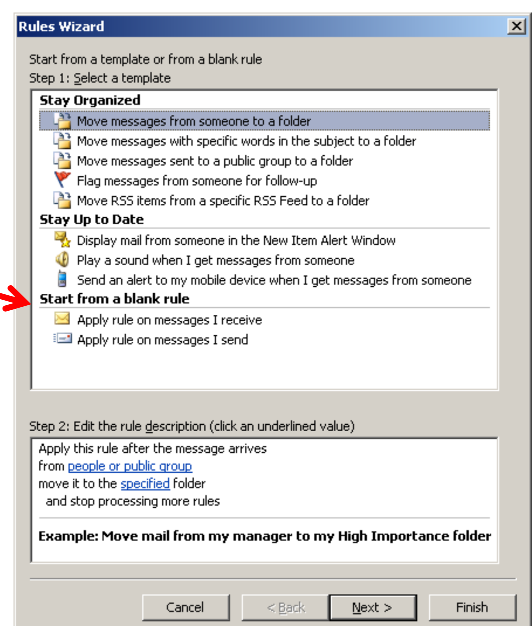
A rule is an action that Outlook takes automatically on an arriving or sent message that meets conditions that you specify.

On the File tab … look for Manage Rules and Alerts





Begin by clicking New Rule

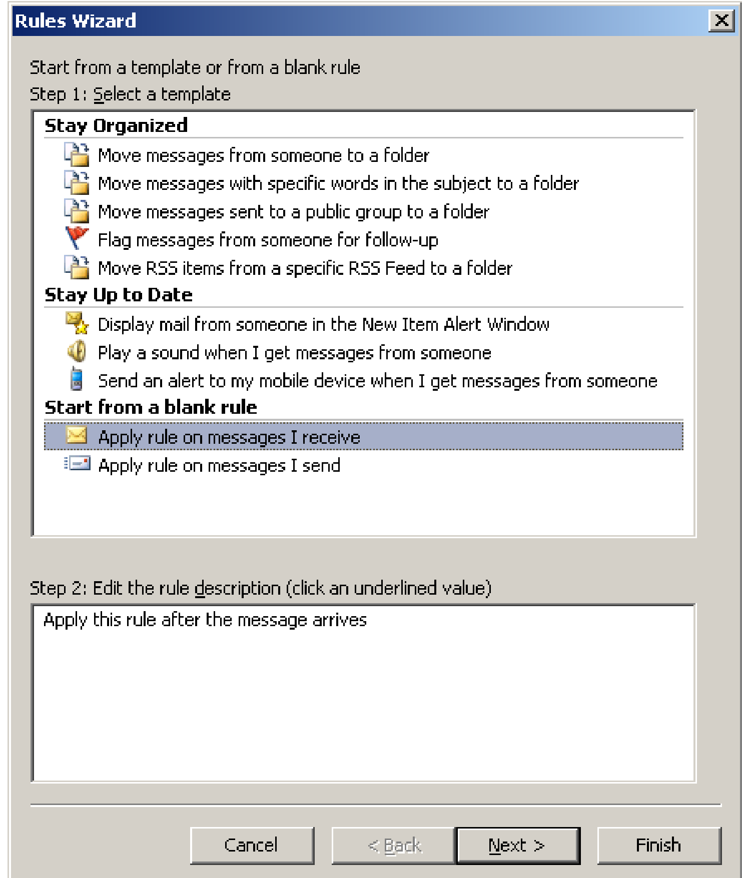


This wizard contains templates for the most commonly used rules to help you stay organized or stay up to date.

For instance you could create a rule that would move messages with specific words in subject or body to a particular folder.

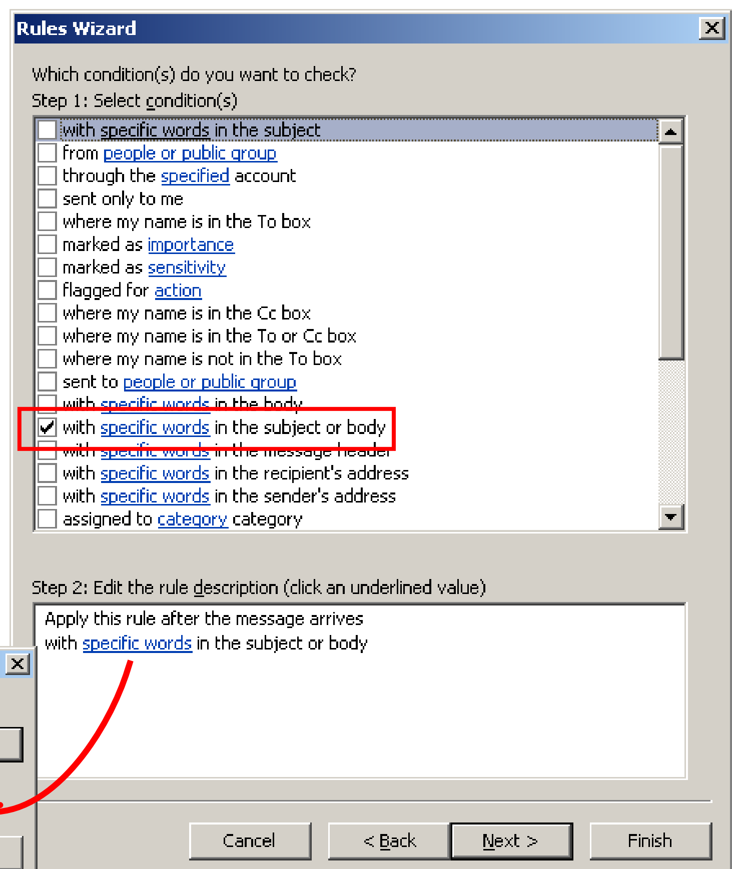
In this example, let's create a rule that provides notification when new sales leads arrive in the Inbox.

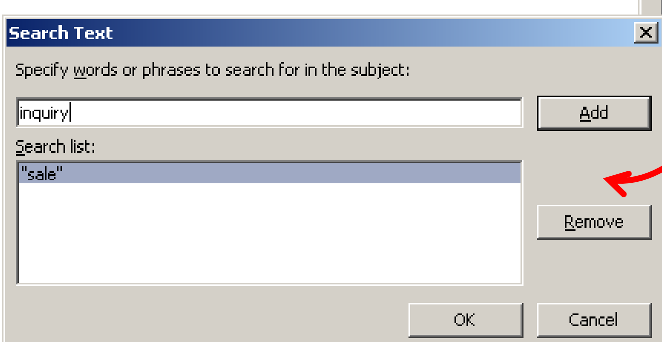
Start with "Apply rule on messages I receive". Then click Next.

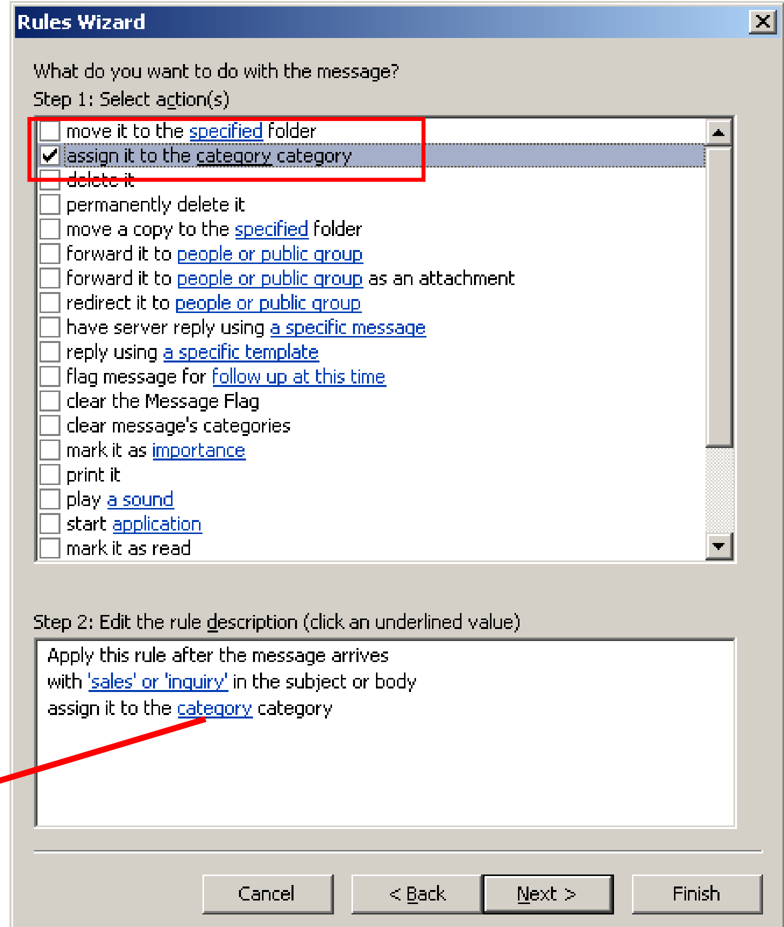


First, check the box to select the condition which looks for specific words in the subject or body.

Second, click the Specific Words text link … add the words "sale" and "inquiry" separately (click Add after each word) … then click OK. This rule will only be triggered if Outlook detects the word Sale or Inquiry in the subject or body of an incoming message.



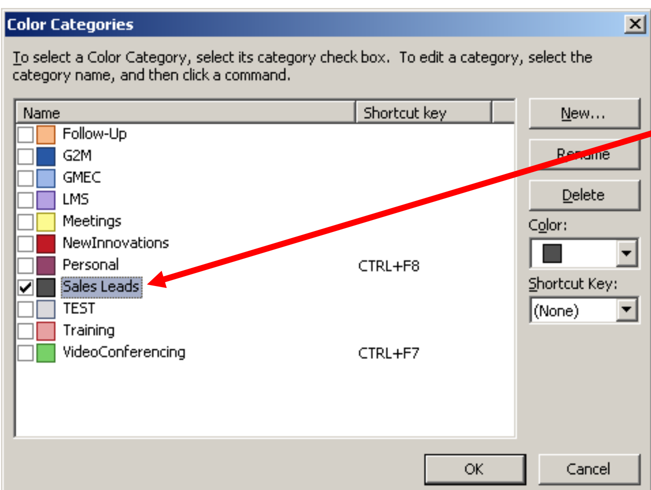




In the next step of the wizard, the actions are defined. For instance, to be reminded to call the prospect and have the message highlighted with a color category. Check the Assign It to the Category box…

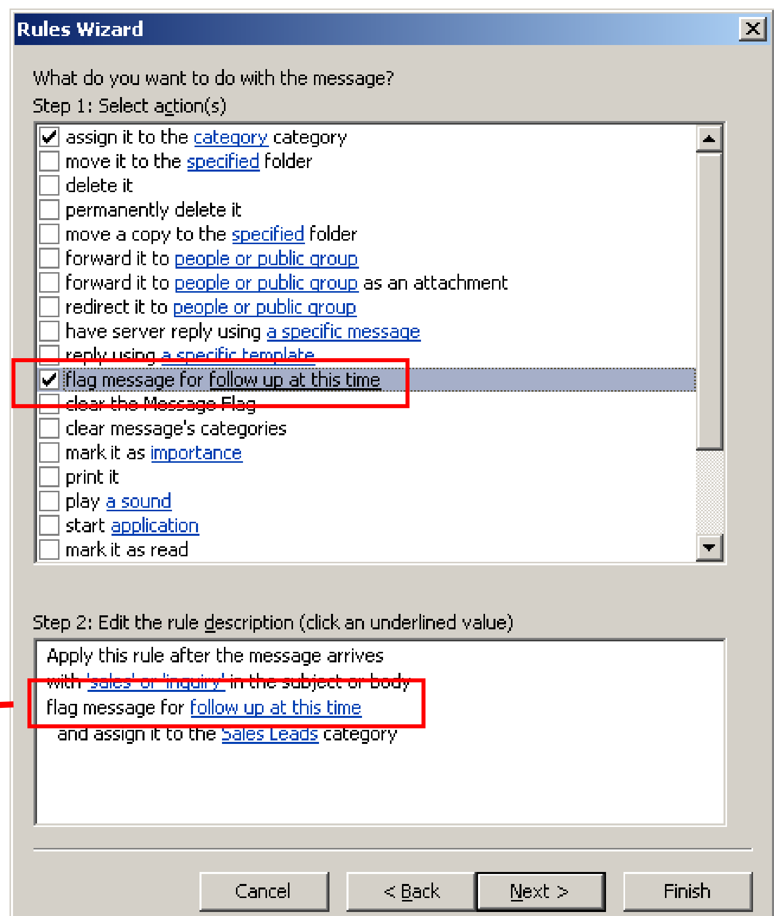
then select the appropriate category.

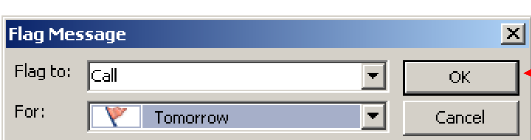
Click OK



You can add options – like to Flag a message for Follow Up at this Time box.

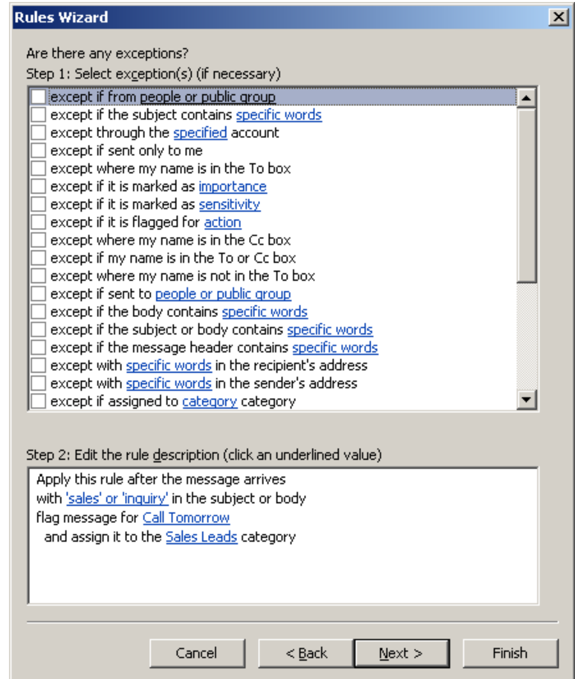
Then click the text link in the bottom half of the window to set the options for this particular action. This example shows to follow up with a phone call the next day.





In the next step exceptions can be applied to this rule. In this particular example, none are needed.

Click Next



Give your new rule a name.

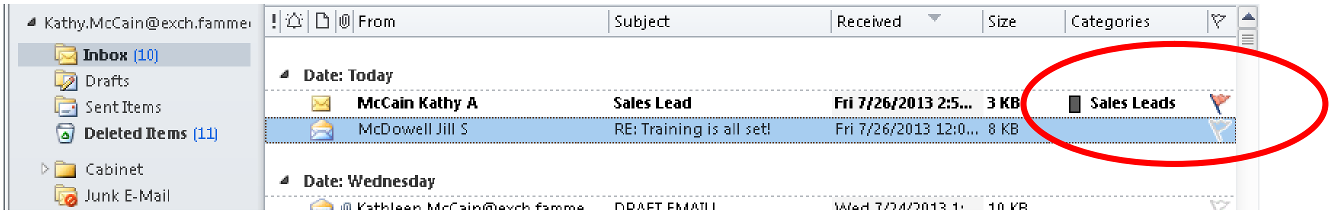
There are a few options here … such as one to Run This Rule Now on Messages Already in the Inbox.

Click Finish

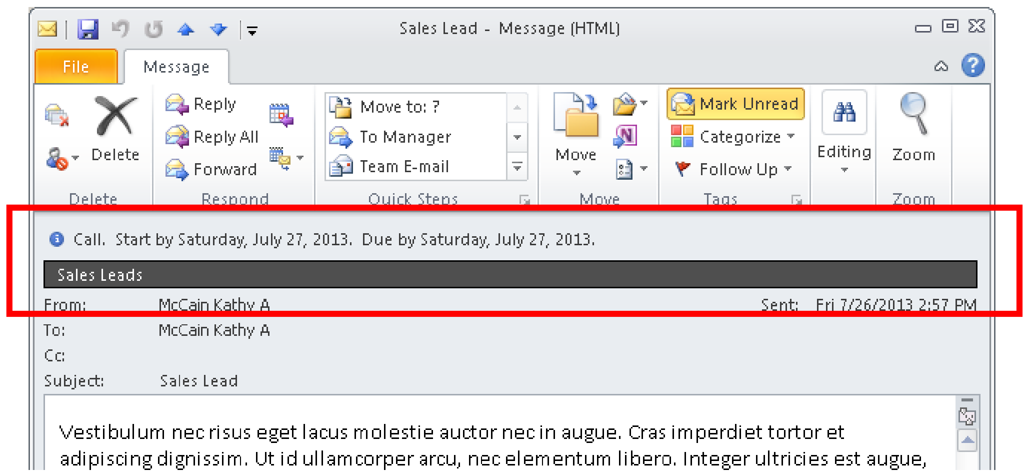
This dialogue box message will pop up – it is just a reminder that Outlook needs to be running for the rule to be processed.

Let’s see how this rule would actually work.

As messages arrive meeting the conditions for the rule – it is flagged for follow up and categorized as a sales lead.



This is even more evident when the message is opened.



Keep in mind it’s easy to modify an existing rule with new conditions or actions. Back in the Rules Wizard … the rule can be modified easily by double-clicking it open and stepping through the wizard … or by choosing a new action from the Change Rules drop-down menu.