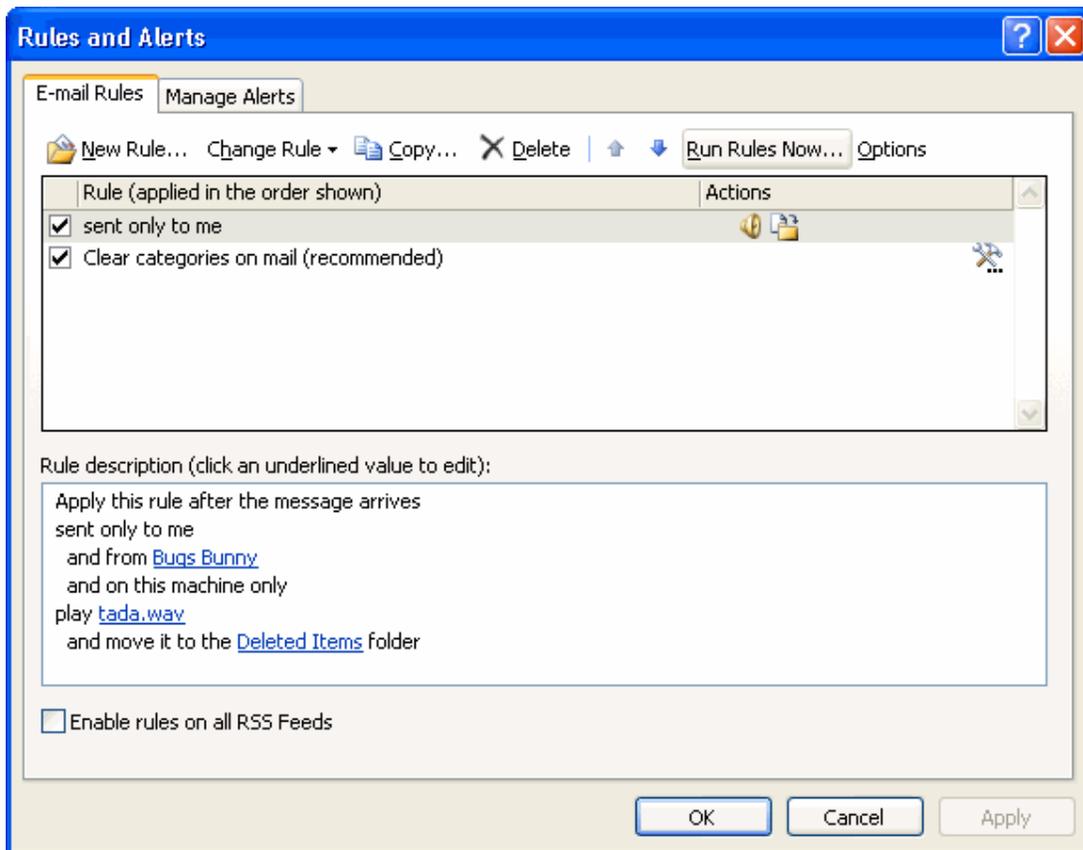


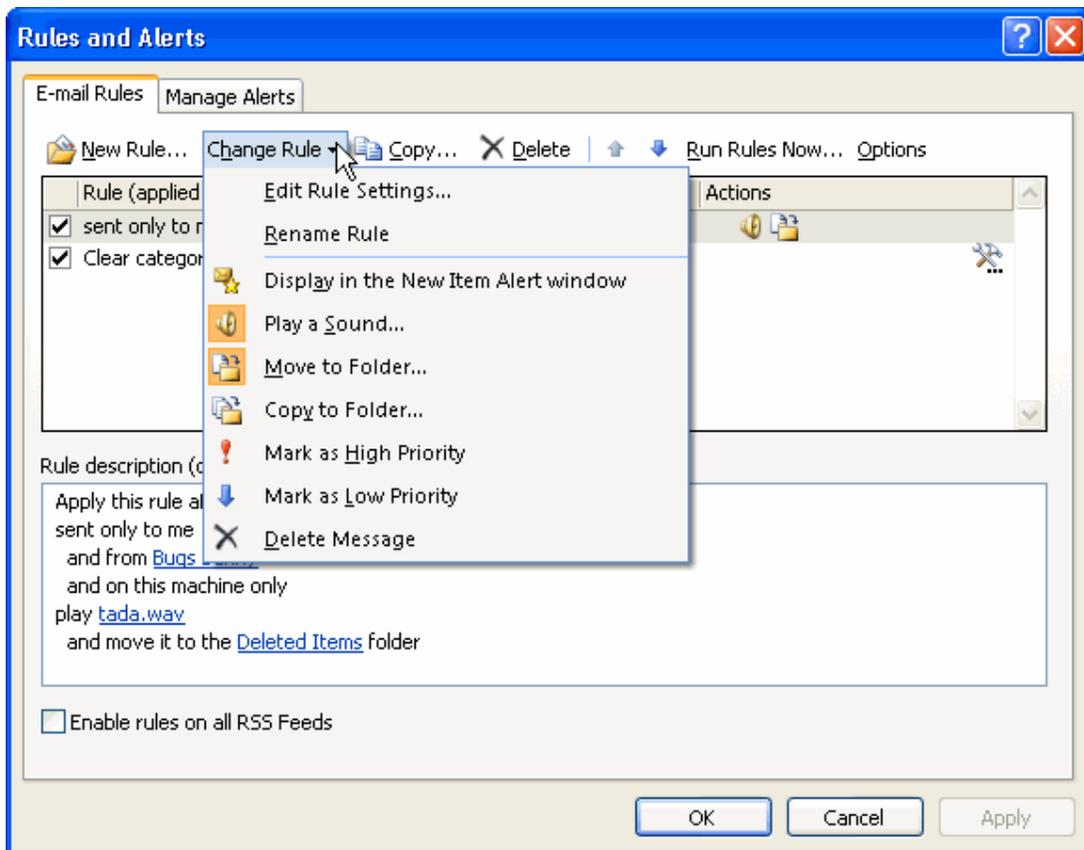
Using the Rules and Alerts Wizard

Let's look at the Rules and Alerts wizard from the beginning. To launch it, just click the Tools menu and click Rules and Alerts, or click the Rules and Alerts button () on the Advanced toolbar.



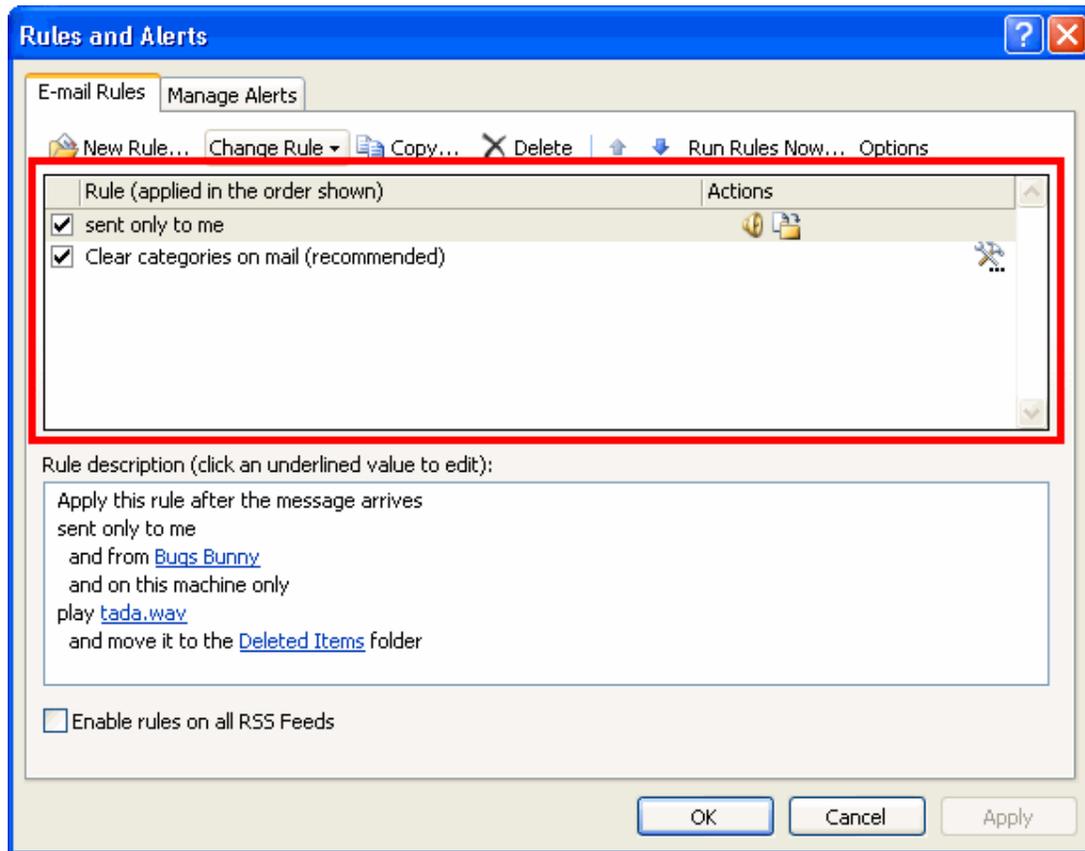
The toolbar at the top of the dialogue gives you options to create a new rule; to change, delete, copy, or move the selected rule; or to run the rule now. The Options button allows you to import, export, or upgrade your rules.

If you're just looking to make a quick change to a rule's action, the Change Rule button is the best way to do it.



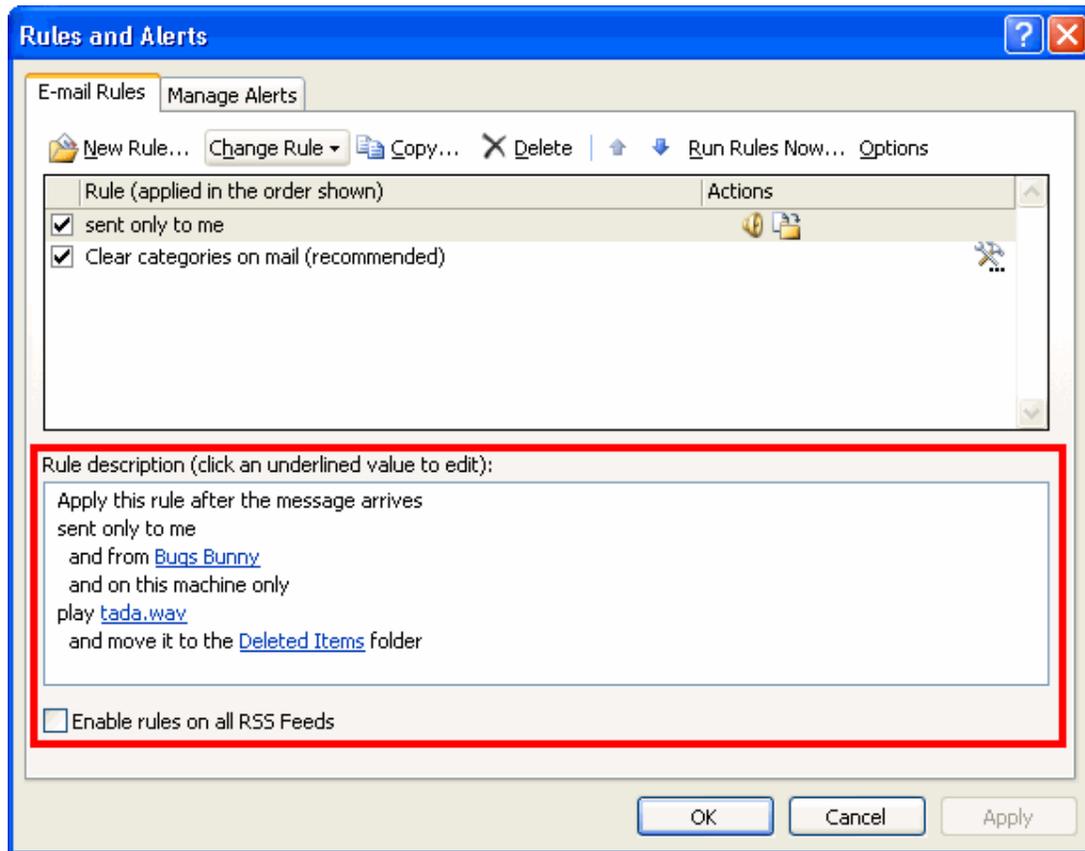
All of the options in the menu are pretty self-explanatory: you can rename the rule or add different options. You'll notice that there are some new options that we didn't have in the Create Rule dialogue box, like changing the message's priority. The options that are already in use for the rule are highlighted with an orange icon (for example, Play a Sound and Move to Folder in the sample menu above). You can click those options to remove that action for the rule.

The icons you see in the menu are important when we're looking at part 2 of the Rules and Alerts box.



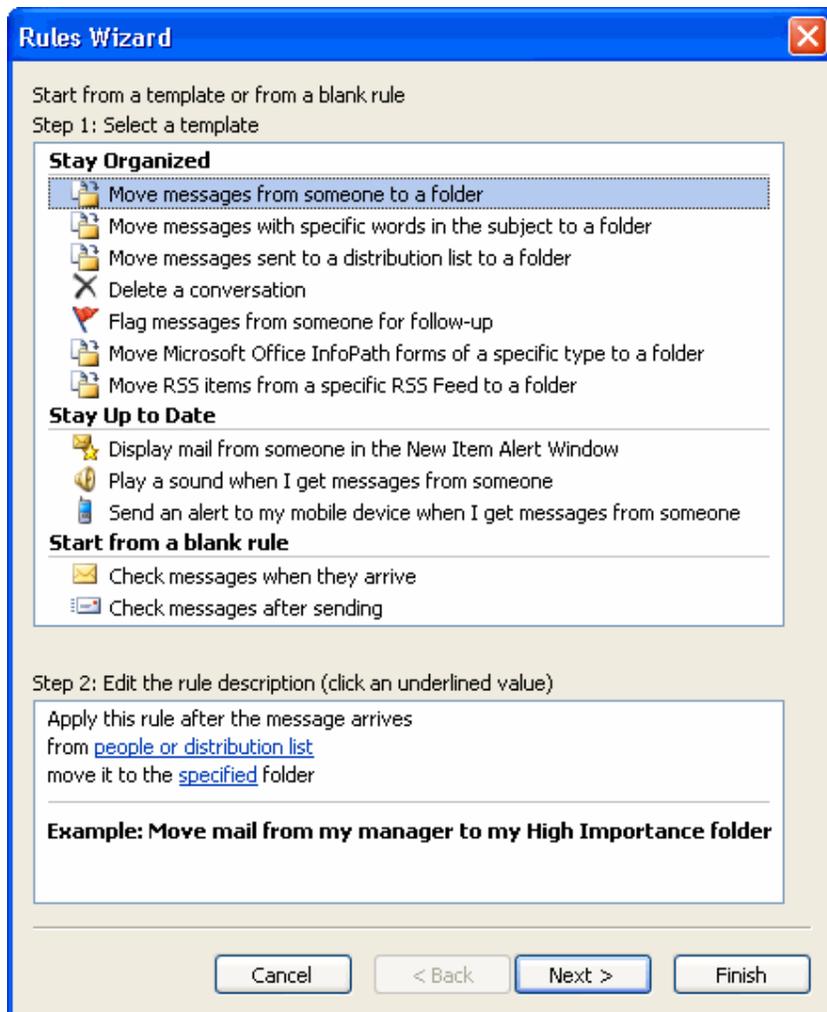
This section is a list of the rules that are in place and the actions that Outlook will take. The actions are identified by the same icons that we saw in the Change Rule menu. In the list, there's also a checkbox by the name of each rule. If the box is checked, the rule is on; if the box is unchecked the rule is off. You can click in the checkbox to change this on/off status.

Part 3 of the Rules and Alerts screen will give you a detailed explanation of each rule that is set up.



You can click the parts that are underlined in blue to change that action or value.

To create a new rule, click the New Rule button in the Rules and Alerts dialogue. The Rules and Alerts wizard will then launch.



First, choose to start from a template or a blank rule.

Stay Organized

-  Move messages from someone to a folder
-  Move messages with specific words in the subject to a folder
-  Move messages sent to a distribution list to a folder
-  Delete a conversation
-  **Flag messages from someone for follow-up**
-  Move Microsoft Office InfoPath forms of a specific type to a folder
-  Move RSS items from a specific RSS Feed to a folder

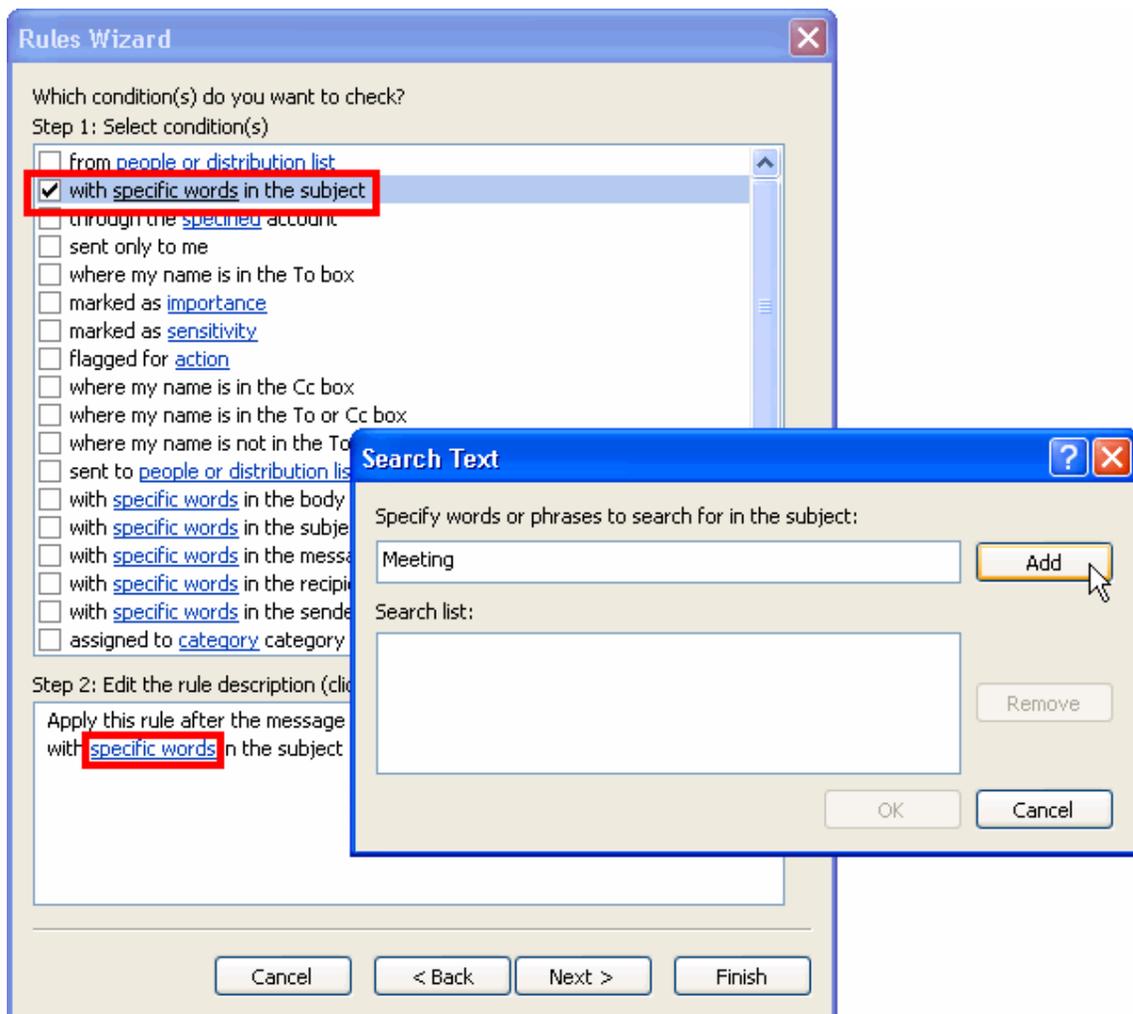
Then, click the blue underlined items to choose a specific value.

Apply this rule after the message arrives
from people or distribution list
flag message for follow up at this time

Example: Flag mail from my manager for follow-up today

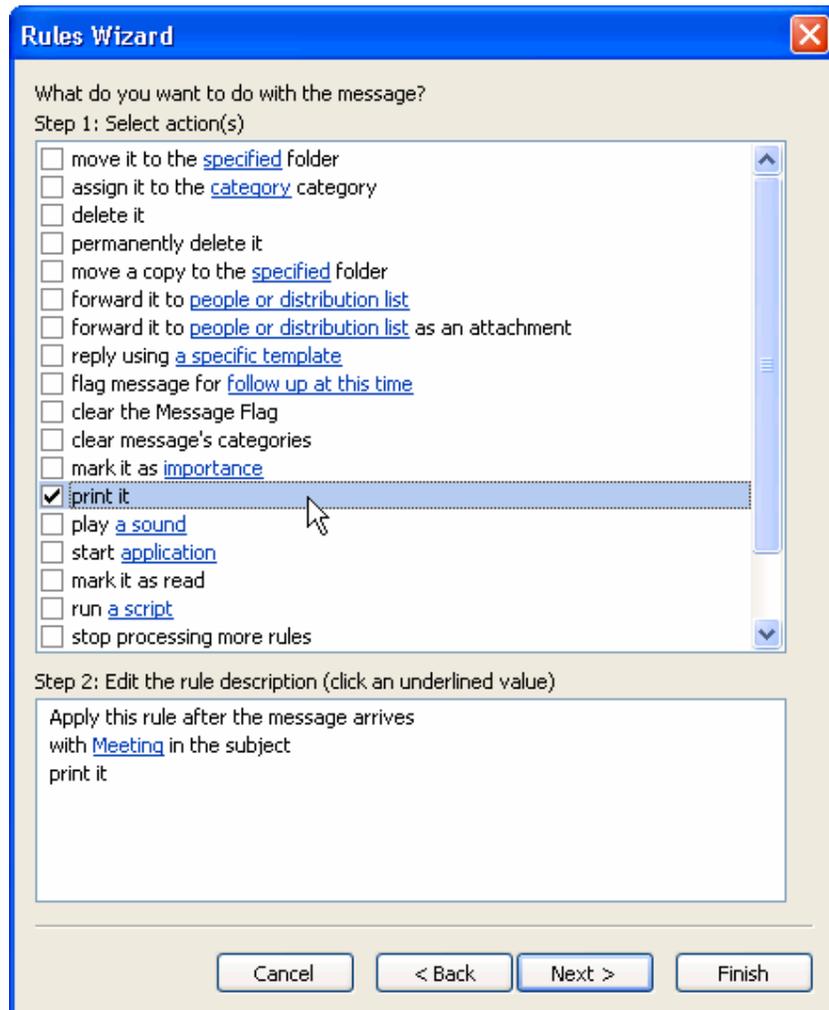
If you start from a template, the remaining steps in the wizard will be filled out for you. Simply confirm your choices by clicking Next, or click Finish at any point.

If you choose to use a blank rule, none of the boxes will be checked when you click Next, so it's up to you what conditions you pick. It's the same idea as before: check the conditions in Step 1, and then click the underlined value in Step 2 to specify your information. In this example, we checked "with specific words in the subject" and then clicked "specific words" in Step 2. Now we'll type the words and click Add.



Once you've set the options in this window (you can check as many as you want) and filled out the values, you can click Next. (If you forget to click an underlined value in step 2,

Outlook will force you to fill out the information before you proceed.) You will then see this window:



This is where you can tell Outlook what to do when the conditions that you specified in the first part of the wizard are met. Once you check an item in Step 1 of this box, you may need to click the underlined value in Step 2 to specify your information. You will also see the conditions that you chose in the previous dialogue listed.

Once we click Next, we'll see our last set of options.



Step 1 in this window is to name your rule; this is the name that will appear in the main Rules and Alerts screen. In Step 2, you can tell Outlook when to run the rule. The first option tells Outlook to run the rule on messages already in the folder you're in. (You can't change the folder for this first option; you can just check the box to run the rule, or uncheck the box so the rule isn't run in that folder.) The next box is checked by default; this will turn your rule on. The third box, "Create this rule on all accounts," is available only if you have multiple e-mail accounts set up.

Step 3 gives you a summary of the conditions, actions, and exceptions for the rule you've created. Once you're done, you can click Finish, and you'll be back to the main Rules and Alerts screen.

Here, you can click Apply and OK to save your changes, or cancel to remove your changes. (Be careful; if you've added a rule but you cancel out of the Rules and Alerts box, that rule will be deleted.)

In summary, there are three ways to create rules in Outlook:

- Create Rule box: The easiest way with only the most frequently used options available.
- Rules and Alerts main screen: A few more options and a nicer interface, but still pretty easy to use.
- Rules Wizard: More time-consuming and complicated, but has all options available.