Creating & Managing Mail Rules - Microsoft Outlook 2016 for the PC

This guide walks you through creating a rule from an email message and managing your rules in Microsoft Outlook 2016 for the PC.

Note: There are two types of rules, server-based rules and client-only rules. Server-based rules apply to your messages even if Outlook isn’t running. Client-only rules apply to your messages only when Outlook is running on an individual’s computer. These rules can only be created and edited in Outlook 2016. Certain conditions, actions, or exceptions that are applied to a rule will change it to a client-only rule (e.g. Action: Play sound). If you remove the item that makes it a client-only rule, then it will be changed back to a server-based rule.

Creating a Rule From an Email Message

1. In the message list pane, click the mail message you want a rule for (See Figure 1).
2. Click the Home tab from the ribbon (See Figure 1).
3. Click Rules (See Figure 1).
4. From the Rules drop-down, click Create Rule (See Figure 1).

Figure 1 - Create Rule from Email
5. In the Create Rule window, the rule will automatically be filled with information from the email message. The following explains what you can add, edit, or delete for a rule:
   a. Condition - When the message arrives, and it matches all of these conditions (See Figure 2).
   b. Action - Does the following actions if all of the conditions match (See Figure 2).
   c. Advanced Options - Add more conditions, actions, or exceptions to the rule (See Figure 2).

6. Select any of the **conditions** and change any of the **criteria** for the condition.

7. Select any of the **actions** and change any of the **criteria** for the action.

8. Click **Advanced Options** to add or remove more conditions, actions, or exceptions.
9. In the *Rules Wizard* window, select more **conditions** if needed (See Figure 6).
10. Change the **criteria** for the conditions, actions, or exceptions (See Figure 6).
11. Click **Next** (See Figure 6).
12. In the Rules Wizard window, select more actions if needed (See Figure 7).
   a. Click to un-select the checkbox next to stop processing more rules (See Figure 7).

   **Note:** If you want the rules to stop processing after it meets the criteria of this rule, leave this box checked.

13. Change the criteria for the conditions, actions, or exceptions (See Figure 7).
14. Click Next (See Figure 7).

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**Figure 7 - Rules Wizard Select Actions**
15. In the *Rules Wizard* window, select more **exceptions** if needed (See Figure 8).
16. Change the **criteria** for the conditions, actions, or exceptions (See Figure 8).
17. Click **Next** (See Figure 8).
18. Type a short descriptive **name** to describe the rule (See Figure 9).

19. Click to select the **checkbox** next to *Run this rule now on messages already in “Inbox”* (See Figure 9).

**Note:** If you don’t want this rule to run on messages already in the inbox, leave this box un-checked.

20. Click to select the **checkbox** next to *Turn on this rule* (See Figure 9).

21. Review the rule (See Figure 9).

22. Click **Finish** (See Figure 9).

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**Managing Rules**

1. Click the **Home tab** from the ribbon (See Figure 10).
2. Click **Rules** (See Figure 10).
3. From the **Rules** drop-down, click **Manage Rules & Alerts** (See Figure 10).
4. You can do the following to manage the Rules and Alerts:
   a. **Rules** - Select a rule to manage (See Figure 11).

   **Note:** Client-only rules apply to your messages only when Outlook is running on an individual’s computer. These rules can only be created and edited in Outlook 2016. Certain conditions, actions, or exceptions that are applied to a rule will change it to a client-only rule (e.g. Action: Play sound). If you remove the item that makes it a client-only rule, then it will be changed back to a server-based rule.
   b. **Preview** - Shows what the currently selected rule will do (See Figure 11).
   c. **On/Off** - Turn on or off rules by selecting or unselecting the checkboxes (See Figure 11).
   d. **New** - Create a new rule (See Figure 11).
   e. **Change Rule** - Edit or rename a currently selected rule (See Figure 11).
   f. **Copy** - Copy a currently selected rule (See Figure 11).
   g. **Delete** - Delete a currently selected rule (See Figure 11).
   h. **Move** - Moves the currently selected rule up or down in the list (See Figure 11).

   **Note:** Rules are processed from top to bottom.
   i. **Run Rules Now** - If you want to manually run one or more rules (See Figure 11).
   j. **OK** - Saves changes made to rules (See Figure 11).
   k. **Cancel** - Cancels changes made to rules (See Figure 11).

Figure 11 - Rules and Alerts