

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

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.

**Note:** New rules will not be applied to an already received message.

### 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. From the *command bar*, click the **extended menu** (See Figure 1).
3. Click **Create rule** (See Figure 1).

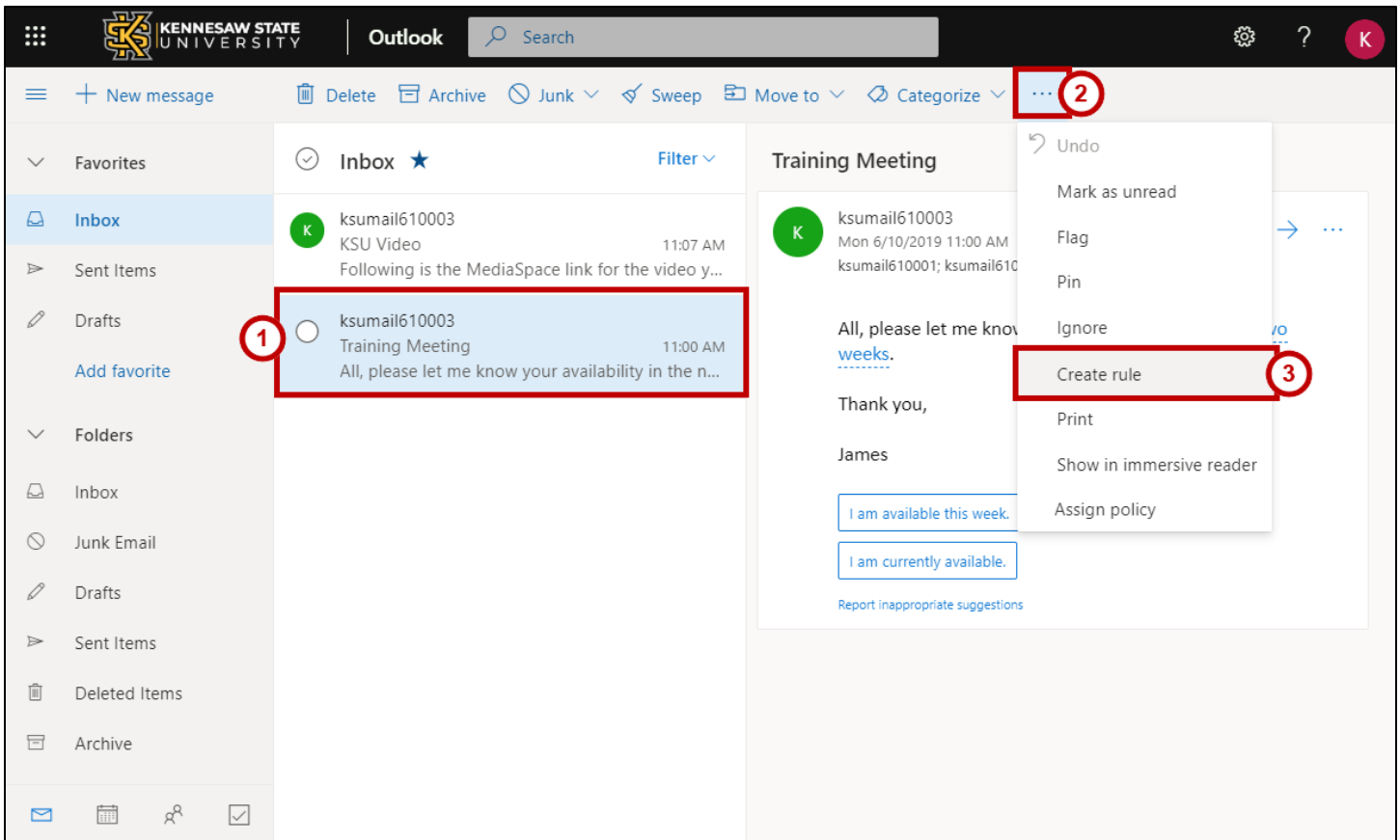


Figure 1 - Create Rule from Email

4. The *Create a rule* window will appear:
  - a. Click the **drop-down arrow** to select an existing folder (See Figure 2).

**Note:** Selecting a folder automatically creates a rule to move messages from the sender to the selected folder.

  - b. Click **More options** to manually create a new rule (See Figure 2).

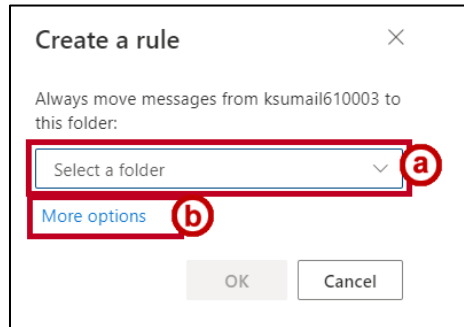


Figure 2 - Create a rule

5. When selecting option b in step 4 above, the *Rules* window will open. 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. **Name** - The name to describe this rule (See Figure 3).
  - b. **Condition** - If a message arrives and matches the conditions actions can be executed (See Figure 3).
  - c. **Action** - Does the following actions if all of the conditions match (See Figure 3).
  - d. **Exception** - Add exceptions for special conditions (e.g. email from Director) (See Figure 3).
  - e. **Rule Processing** - Stop processing more rules if this rule meets the criteria (See Figure 3).

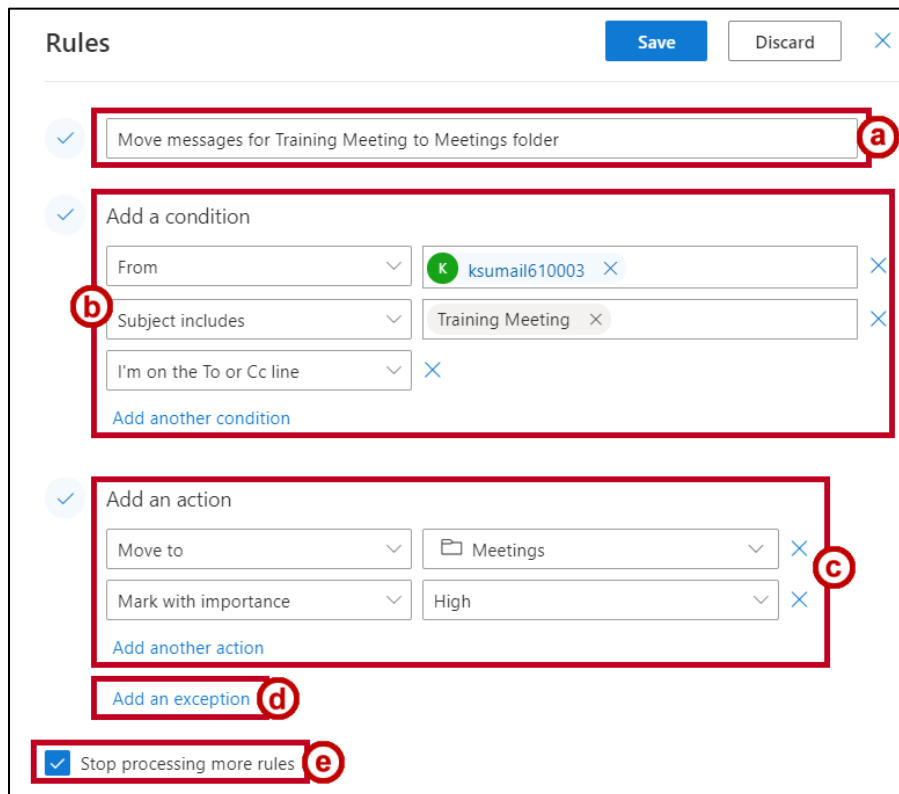


Figure 3 - New Inbox Rule

6. Type a short descriptive **name** to describe the rule.

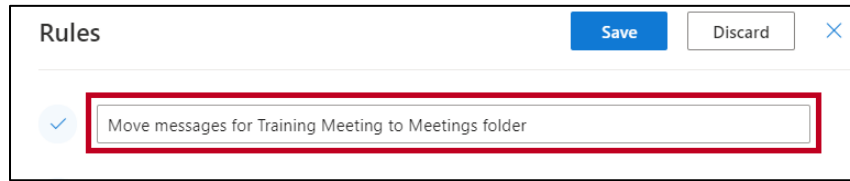


Figure 4 - Rule Name

7. Review the **conditions**:

- a. To change the condition, click the **drop-down menu** (See Figure 5).
- b. To change the criteria for the condition, enter a **criterion** in the *criteria* field (See Figure 5).
- c. To add another condition, click **Add another condition** (See Figure 5).
- d. To delete a condition, click the **X** (See Figure 5).

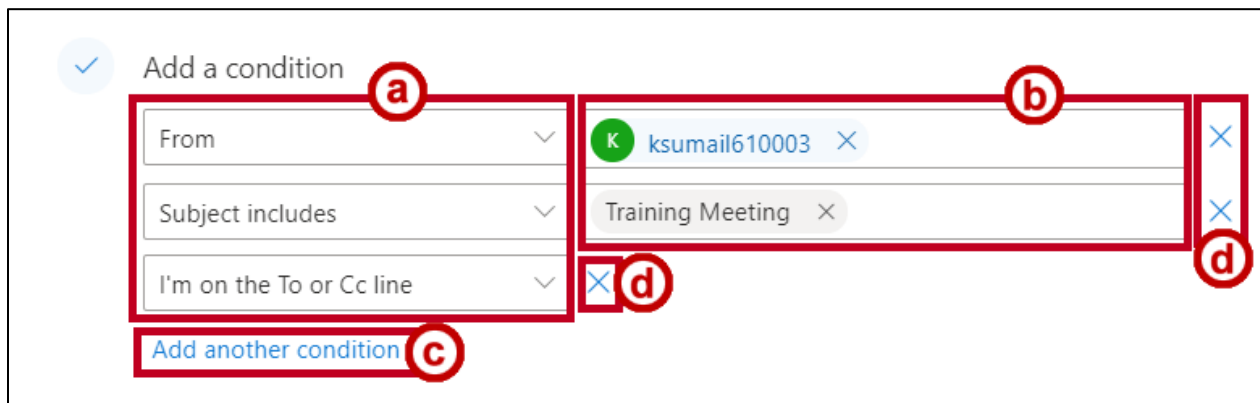


Figure 5 - Rule Conditions

8. Review the **actions**:

- a. To change the action, click the **drop-down menu** (See Figure 6).
- b. To change the criteria for an action, enter a **criterion** in the *criteria* field (See Figure 6).
- c. To add another action, click **Add another action** (See Figure 6)
- d. To delete an action, click the **X** (See Figure 6).

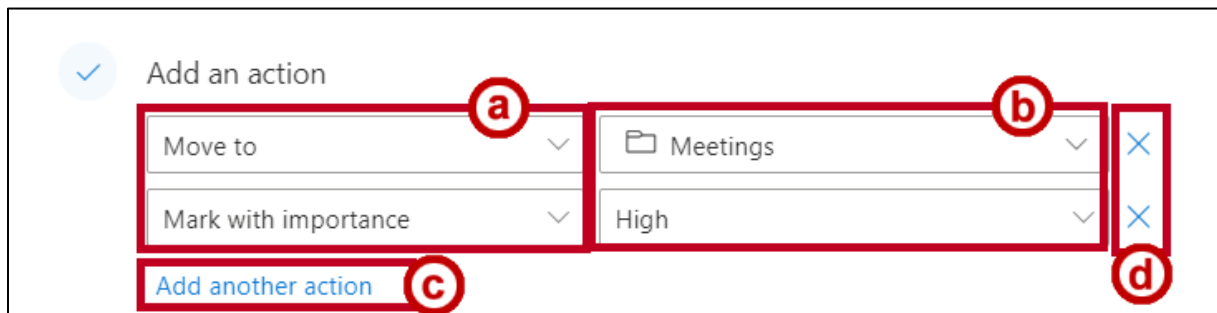


Figure 6 - Rule Actions

9. Review the **exceptions**:

- a. To change the exception, click the **drop-down menu** (See Figure 7).
- b. To change the criteria for an exception, enter a **criteria** in the *criteria* field (See Figure 7).
- c. To add another exception, click **Add another exception** (See Figure 7).
- d. To delete an exception, click the **X** (See Figure 7).

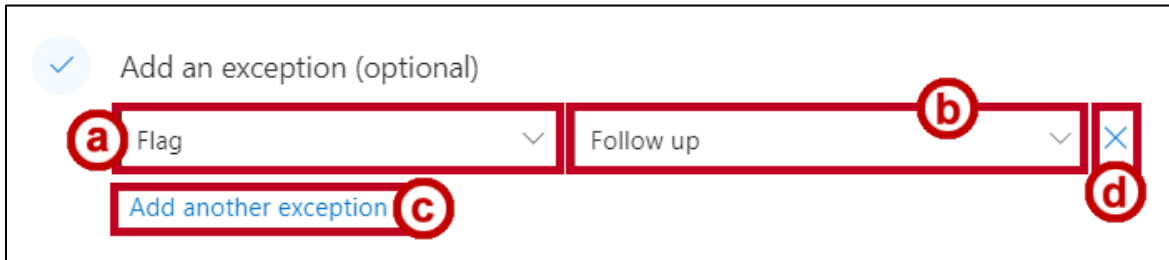


Figure 7 - Rule Exceptions

10. Click to un-select the **checkbox** next to *Stop processing more rules* (See Figure 8).

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

11. Click **Save** (See Figure 8).

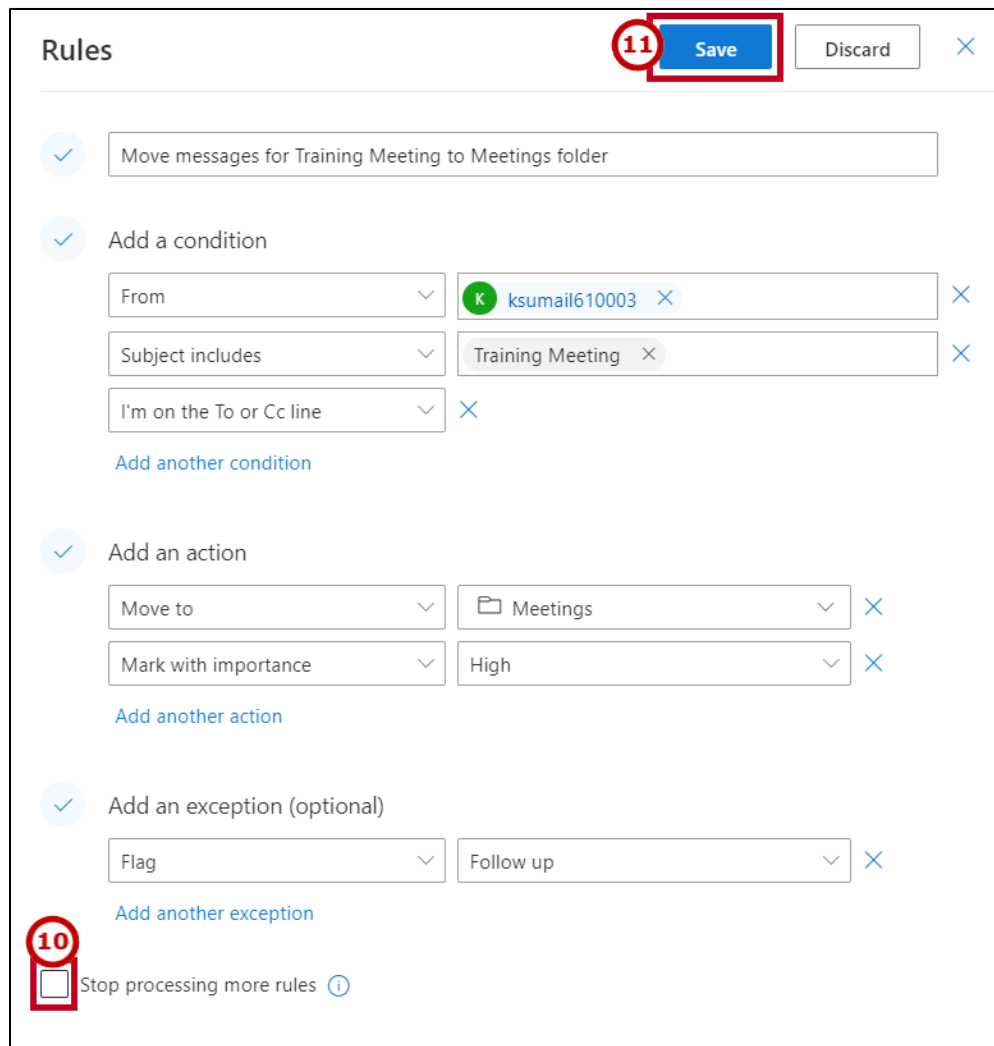


Figure 8 - Save Rule

## Managing Rules

1. Click **Settings** (See Figure 9).
2. Click **View All Outlook Settings** (See Figure 9).

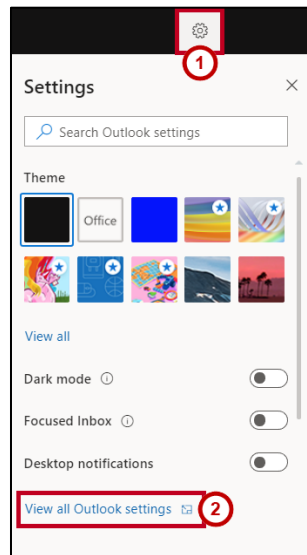


Figure 9 - View All Outlook Settings

3. Click **Rules** (See Figure 10).
4. You can do the following to manage the Inbox rules:
  - a. **Add New Rule** - Create a new rule (See Figure 10).
  - b. **On/Off** - Turn on or off rules by clicking the toggle button (See Figure 10).
  - c. **Preview** - Shows what the currently selected rule will do (See Figure 10).
  - d. **Move Up** - Moves the rule up in the list. Rules are processed from top to bottom (See Figure 10).
  - e. **Move Down** - Moves the rule down in the list (See Figure 10).
  - f. **Edit** - Edits the selected rule (See Figure 10).
  - g. **Delete** - Deletes the selected rule (See Figure 10).

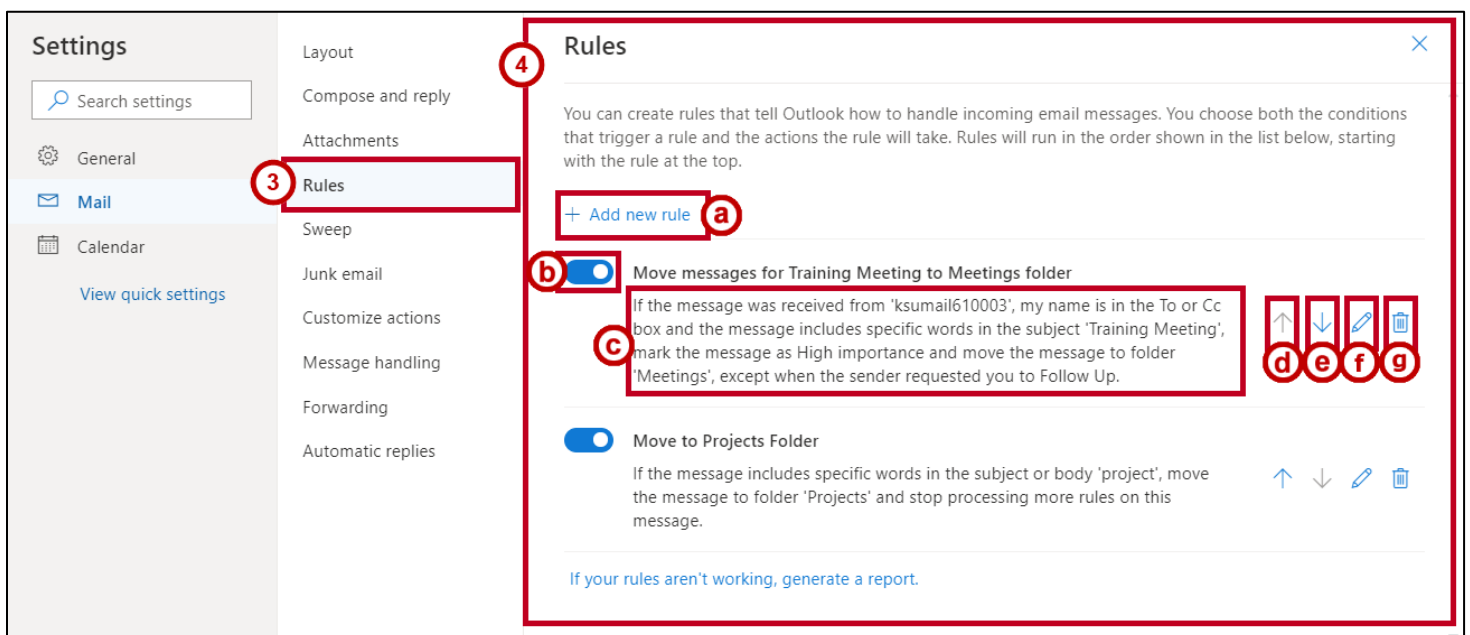


Figure 10 - Inbox Rules

5. After clicking *Edit* for your selected rule, the *Rules* window will appear. The following explains what you can add, edit, or delete for a rule:
  - a. **Name** - The name to describe this rule (See Figure 11).
  - b. **Condition** - If a message arrives and matches conditions actions can be executed (See Figure 11).
  - c. **Action** - Does the following actions if all of the conditions match (See Figure 11).
  - d. **Exception** - Add exceptions for special conditions (e.g. flag for follow-up) (See Figure 11).
  - e. **Rule Processing** - Stop processing more rules if this rule meets the criteria (See Figure 11).
6. When you have completed your changes to the rule, click **Save**.

Figure 11 - New Inbox Rule