About Outlook 2007 E-Mail Rules

Managing your e-mail can take a lot of time and energy. Create specific rules in Outlook 2007 to route mail into folders, forward mail to other people and devices, and to receive notifications when mail arrives from specific parties.

Topics in this guide:

- Route E-mail from Distribution Lists
- Organize Voice Mail Messages
- Collect Responses for a Meeting Request
- Flag E-Mail Messages
- Create Customized Rules

Route E-Mail from Distribution Lists

A distribution list (DL) is a mailing list dedicated to a particular subject. Automatically route DL messages into special folders so you can browse them when you have time. This lets you save the mail for later, and helps keep your Inbox organized, too.

Note This procedure familiarizes you with the Outlook 2007 Rules Wizard. Subsequent topics explain general approaches to rules, but do not go through the Rules Wizard in the same detail.
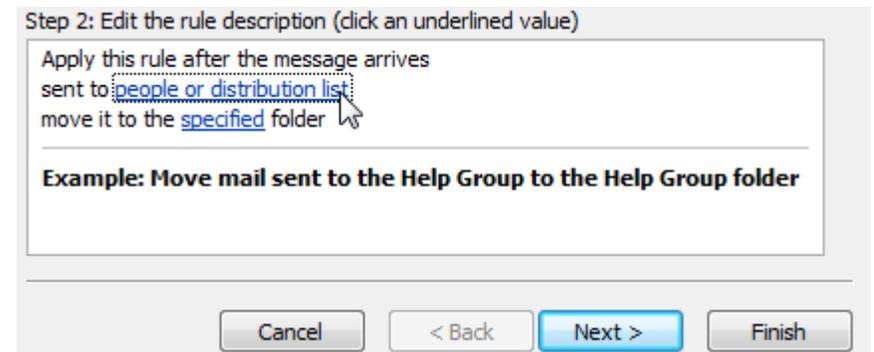
1 In **Mail** view, on the **Tools** menu, click **Rules and Alerts**.

2 In the **Rules and Alerts** dialog box, click **New Rule**.

3 In the top window of the **Rules Wizard**, click **Move messages sent to a distribution list to a folder**.
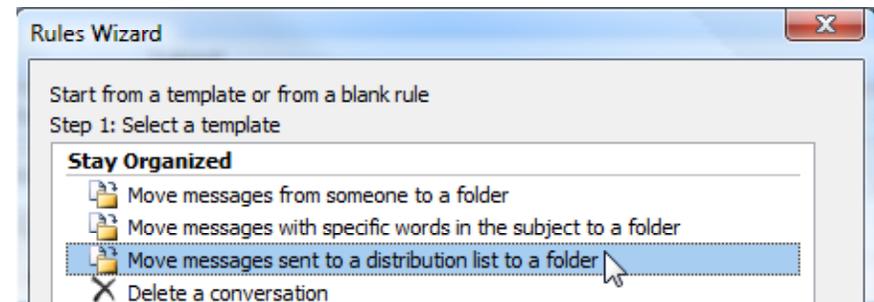
4 In the bottom window of the **Rules Wizard**, click **people or distribution list**.

5 In the **Rule Address** window, search for the DLs you subscribe to, select them, and then add them to the **To** line. When you have finished, click **OK**.
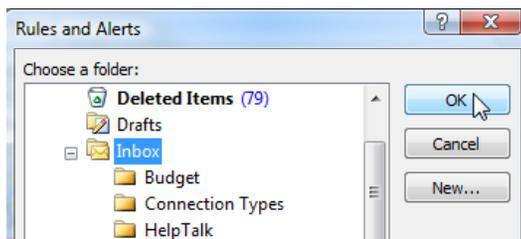
6 In the bottom window of the **Rules Wizard**, click **specified**.

7 Do one of the following:

Browse to a folder in your Mailbox, and then click **OK**.

–OR–

Click **New** to create a new folder, follow the prompts, and then click **OK**.
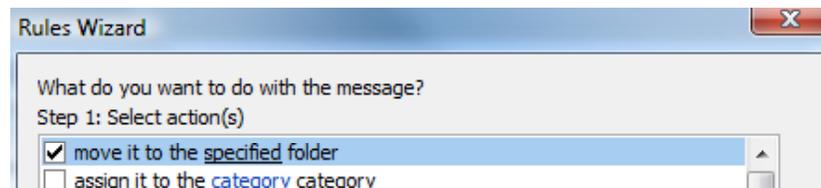
8 Click **Next**.

9 On the **Which conditions do you want to check** page, select conditions you want the rule to check, and then click **Next**.

Note The check box for the **sent to people or distribution list** condition is selected already. If you select other conditions, you may be prompted to supply further information.

10 On the **What do you want to do with the message** page, select actions you want the rule to perform, and then click **Next**.

Note The check box for the **move it to the specified folder** action is selected already. If you select other actions, you may be prompted to supply further information.

11 On the **Are there any exceptions** page, select any exceptions you want to make to this rule. When you have finished, click **Next**.

Exceptions you specify will not be affected by the rule. For instance, if you make an exception for mail marked with high importance, the rule will not apply to messages with this status.

12 On the **Finish rule setup** page, confirm your rule specifications and make changes as necessary. When you have finished, click **Finish**.

Notes

• Get a head start on creating a rule by clicking **Create Rule** at the top of a message. This opens a dialog box with options specifically related to the message.

• Rules apply to new mail you receive or send. To apply a rule to mail already in your Inbox, in the toolbar of the **Rules and Alerts** dialog box, click **Run Rules Now**.

• To change or delete existing rules, select the rule, and then click the appropriate buttons in the toolbar of the **Rules and Alerts** dialog box.

Organize Voice Mail Messages

To keep your voice mail messages together, automatically route them into a special folder and listen to them when you are ready.

Use the Rules and Alerts Wizard to create a rule that scans the subject line of your incoming mail, looking for voice mail messages. These messages will be routed into a folder of your choice. For more details on using the Rules and Alerts Wizard, see the first topic in this guide.

1   Open the Outlook **Rules Wizard**.

2   In the top section, click **Move messages with specific words in the subject to a folder**.

3   In the bottom section of the **Rules Wizard**, click **specific words**.

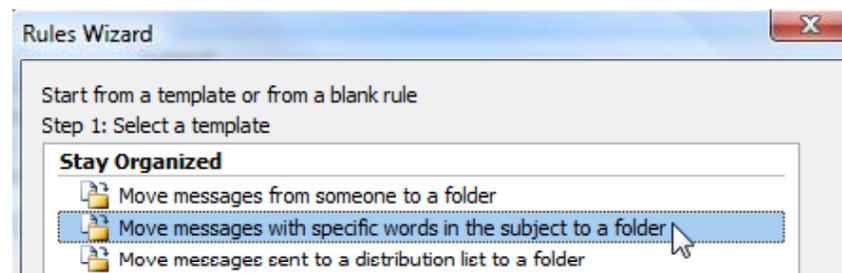4   In the **Search Text** box, type **voice mail message**. (The Search Text box is not case sensitive.)
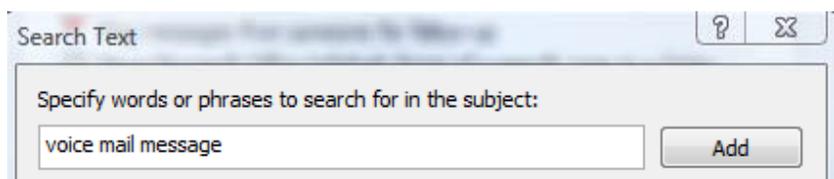
5   Click **ADD**, and then click **OK**.

6   Click **Next**, and then follow the rest of the wizard until the rule is complete and activated.

Collect Responses for a Meeting Request

When you schedule meetings, tracking responses can be distracting and time consuming. By automatically routing such replies into a special folder, you can review them at a time that works best for you.

Use the Rules and Alerts Wizard to create a rule that scans the subject line of your incoming messages, looking for replies to a meeting request. These replies will be routed into a special folder. For more details on using the Rules and Alerts Wizard, see the first topic in this guide.

1   Open the Outlook **Rules Wizard**.

2   In the top section, click **Move messages with specific words in the subject to a folder**.

3   In the bottom section, click **specific words**.

4   Go to your meeting request, copy the **Subject** line, and return to the Wizard and paste the line into the **Search Text** box. Click **ADD**, and then click **OK**.

5   Click **Next**, and then follow the rest of the wizard until the rule is complete.

Flag E-Mail Messages

You might want to automatically convert a certain class of mail—messages from a manager, for instance—into tasks to ensure you follow up. A rule can be set up that will perform this conversion automatically, saving you time and trouble.

Use the Rules and Alerts Wizard to create a rule that identifies characteristics in your messages and then flags them for follow up. For instance, you can flag mail from a particular person or DL, or you can flag mail with certain words in the Subject line or body. For more details on using the Rules and Alerts Wizard, see the first topic in this guide.

1 Open the Outlook **Rules Wizard**.

2 In the top section, click **Flag messages from someone for follow-up**.
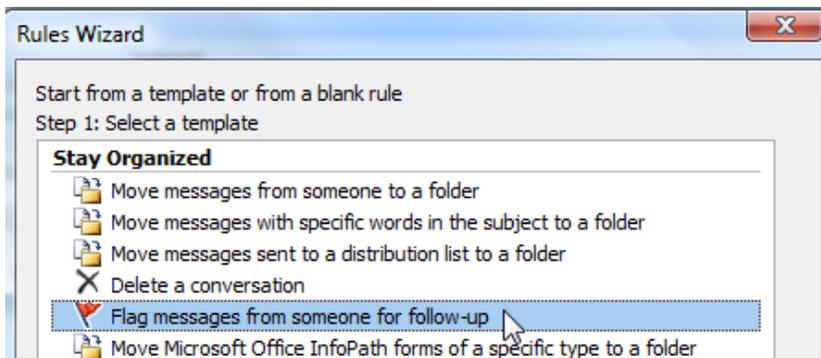
3 Click **Next**, and then follow the rest of the wizard until the rule is complete.

Create Customized Rules

In addition to pre-formatted rules, you can create customized rules.

1 Open the Outlook **Rules Wizard**.

2 Under **Start from a blank rule**, determine whether you want a rule for incoming messages or sent messages, and then click the link.

3 Click **Next**, and then follow the rest of the wizard until the rule is complete and activated.

Note You can also click **Create Rule** at the top of a message. This opens a dialog box with options specifically related to the message.