

SETTING UP AN AUTO REPLY OR AUTO FORWARD IN OUTLOOK

Lawyers can use the Automatic Replies (Out of Office) or Auto Forward functions in Outlook to ensure an immediate response to an email if you're unavailable, such as to notify senders that you are out of the office and when you will be returning, or to automatically forward emails to a legal assistant or a different email account. These instructions are for desktop and web-based versions of Microsoft Outlook for Microsoft 365, but the steps described may be helpful in creating client folders in other email programs.

Set Up an Auto Reply

Desktop-based Outlook:

The steps vary depending on whether you are using an Exchange or Non-Exchange account. To determine which type of account you are using, check the status bar in Outlook at the bottom right of the screen. If you are using an Exchange account, the status bar should say "Connected to Microsoft Exchange."

1. Exchange Account

- a. With Microsoft Outlook open, click the **File** tab, and then click the **Info** tab in the menu.
- b. In the **Automatic Replies** dialog box, select the **Send Automatic Replies** check box.
- c. If you want to specify a set date and time range for the auto reply, select the **Only send during this time range** check box. Then set the **Start time** and the **End Time**. If you do not choose a specific date and time range, the auto replies will continue to be sent until you go back to the **Automatic Replies** dialog box and select the **Do not send automatic replies** option.
- d. In the **Inside My Organization** tab, type the message that you want to send within your organization, and in the **Outside My Organization** tab, type the message that you want to send outside your organization. Then click **OK**.

2. Non-Exchange Account

- a. The **Automatic Replies (Out of Office)** function is not available on non-exchange accounts. However, you can combine an email template with the rules function to achieve a similar result.
- b. Click **New Email** on the ribbon. On the **Format Text** tab, click **Plain Text**. Then type the information that you want to have in your auto reply message. Click **File** on the ribbon, and then click **Save As**.
- c. In the **Save As** dialog box, select **Outlook Template** in the **Save As** type list. Type a name for your reply template in the **File name** box, and then click **Save**. The template should automatically be saved in a template folder on your hard drive.
- d. Click the **File** tab in the ribbon, and then click the **Info** tab on the menu.
- e. Click **Manage Rules & Alerts**, and then click the **New Rule** button on the email **Rules** tab.
- f. In the **Rules Wizard** under **Start from a blank rule**, click **Apply rule on messages I receive**, and then click **Next**.
- g. Under **Which condition(s) do you want to check**, select any conditions you want, and then click **Next**. If you wish to send an auto reply on certain messages,

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- select conditions for each type of message. If you want all your messages to respond with an auto reply, leave everything unchecked.
- h. Under **What do you want to do with the message**, click to select the **Reply using a specific template** check box.
 - i. Under **Step 2: Edit the Rule Description**, click the underlined phrase **a specific template**.
 - j. In the **Select A Reply Template** dialog box, click the template that you saved previously (it should be located in "User Templates in File System") and then click **Open**.
 - k. Complete the **Rules Wizard** instructions, click **Finish**, and then click **OK**.

Web-based Outlook:

1. Microsoft 365 (for the web)

- a. With Microsoft Outlook open, click the **Settings Icon**, which looks like a sprocket and is located at the top right. Then click the **View all Outlook settings**.
- b. Be sure that **Mail** is selected from the left-hand menu. Click **Automatic Replies**.
- c. Click the toggle to **Automatic replies on**.
- d. If you want to specify a set date and time range for the auto reply, check the box for **Send replies only during a time period**. Then set the **Start time** and the **End Time**. If you do not choose a specific date and time range, the auto replies will continue to be sent until you go back to the **Automatic Replies** dialog box and select the **Do not send automatic replies** option.
- e. In the **Inside My Organization** tab, type the message that you want to send within your organization, and in the **Outside My Organization** tab, type the message that you want to send outside your organization. Then click **OK**.

Set Up an Auto Forward

Auto Forward allows you to automatically forward emails received in your inbox. This can be helpful if you do not have the ability to access your Outlook account remotely. You can then have the email forwarded automatically to a legal assistant or to another email account that can be accessed remotely.

Desktop-based Outlook:

- a. With Microsoft Outlook open, click the **File** tab, and then click the **Info** tab in the menu.
- b. Click **Manage Rules & Alerts**, and then click the **New Rule** button on the email **Rules** tab.
- c. In the **Rules Wizard** under **Start from a blank rule**, click **Apply rule on messages I receive**, and then click **Next**.
- d. Under **Which condition(s) do you want to check**, select any conditions you want, and then click **Next**. If you wish to only forward certain messages, select conditions for each type of message. If you want all your messages to be forwarded, leave everything unchecked.
- e. Under **What do you want to do with the message**, click to select the **forward it to people or public group** check box.
- f. Under **Step 2: Edit the Rule Description**, click to select the **people or public group**. This will open your address book. Search for the email address(es) to

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- which you would like to forward your email. You can also just type the full email addresses in the **To** field. Then click **OK**.
- g. You will be returned to the **Rules Wizard**, and click **Next**. The box to set up exceptions appears. Select any exceptions you would like to apply to this rule, and click **Next**.
 - h. Under **Specify a name for this rule**, give your rule a name. Then check the box for **Turn on this rule** if you would like to start forwarding messages now. Check **Run this rule now on messages already in “Inbox”** if you would like to forward everything that is already in your Inbox. Then click **Finish**.

Web-based Outlook:

- a. With Microsoft Outlook open, click on the **Settings** icon, which looks like a sprocket and is located at the top-right.
- b. Click **View all Outlook settings**. Be sure that **Mail** is selected from the menu on the left.
- c. Click **Rules**.
- d. Click **+Add new rule**.
- e. In prompt 1, enter a name for your rule.
- f. In prompt 2, click **Select a condition**, and from the menu of conditions select **From**. Type the email address for the person or group sender you want to apply your rule to (i.e., section@osbar.org, or sender@americanbar.org). In addition, you can add other conditions, such as the inclusion of language included in the subject, by clicking **Add another condition**.
- g. In prompt 3, click **Select an action**, and from the menu of actions select **Forward to**. Enter the email address to which you will forward the email. You can add other actions, such as designating the importance of emails, by clicking **Add another action**.
- h. Check the box for Stop processing more rules.
- i. Click the Save button.
- j. The Rules menu will appear, listing all rules created. Rules can be turned on or off by toggling the switch next to each rule. In addition, rules may be ordered, edited or deleted by clicking the up/down, pencil or trash can icons, respectively.

IMPORTANT NOTICES

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