

SETTING UP EMAIL RULES IN OUTLOOK

Lawyers can use automated rules to manage incoming email messages. Rules can run automatically and perform specific actions, like moving emails to specified folders (i.e., organizing messages from listservs, eCourt notices, etc.). The instructions below demonstrate how to create a rule to sort email messages automatically into a specified folder. 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.

Create a Rule

Desktop-based Outlook:

1. With Microsoft Outlook open, click the **File** tab.
2. Click **Manage Rules & Alerts**. The Rules and Alerts dialog box will appear.
3. Under the **E-Mail Rules** tab, click on **New Rule...** The Rules Wizard dialog box will appear.
4. Under Step 1, look for **Stay Organized**. Select **Move messages from someone to a folder**.
5. Under Step 2, edit the rule description by clicking the underlined words, from **people or public group**. The Rule Address dialog box will appear.
6. In the **From** box, 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). (You can also choose an email address from your contacts using the **Address Book** field.)
7. Click **OK**.
8. Under Step 2, edit the rule description further by clicking the underlined words, move it to the **specified** folder. The Rules and Alerts dialog box will appear.
9. Select the appropriate folder (or create a folder by clicking **New....**).
10. Click **OK**.
11. Click **Next**.
12. Under Step 1, confirm the condition **from people or public group** is selected.
13. Click **Next**.
14. Under Step 2, confirm the actions **stop processing more rules**, and **move it to the specified folder**, are selected.
15. Click **Next**.
16. In this example, there are no exceptions to the rule. Do not select any exceptions.
17. Click **Next**.
18. In the **Specify a name for this rule** field, type a name for your rule.
19. Confirm **Turn on this rule** is checked (and if necessary, **Run this rule now on messages already in "Inbox"**).
20. Click **Finish**. The rule automatically moves incoming messages from the chosen sender to the applicable folder. Watch the folder for unread messages, shown with a blue number next to the folder name (i.e., FOLDER NAME **10**).

Web-based Outlook:

1. With Microsoft Outlook open, click on the **Settings** icon, which looks like a sprocket and is located at the top-right.
2. Click **View all Outlook settings**. Be sure that **Mail** is selected from the menu on the left.
3. Click **Rules**.
4. Click **+Add new rule**.

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5. In prompt 1, enter a name for your rule.
6. In prompt 2, click **Select a condition** and then **From** in the menu of conditions. 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).
7. In prompt 3, click **Select an action**, **Select a folder**, and then **Move to a different folder...** From the drop down menu, select a designated folder.
8. Check the box for **Stop processing more rules**.
9. In this example, there are no exceptions to the rule. Do not select any exceptions.
10. Click the **Save** button.
11. 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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