

SETTING UP AUTOMATED EMAIL REPLIES AND RULES IN OUTLOOK

Lawyers can use automated replies and rules to manage and respond to incoming email messages (i.e., when out of the office, or when a lawyer departs a law firm). Rules can run automatically, and perform specific actions, like moving or deleting email messages.

The instructions below demonstrate how to create an auto reply message and a rule deleting incoming messages, in the event of an attorney departure. These instructions are for Microsoft Outlook 2016, but the steps described may be helpful in setting automated replies and rules in other email programs. (If setting up an auto reply and rule for a departed attorney, you may need to use that attorney's computer.)

Create a Message Template

1. With Microsoft Outlook open, click the **Home** tab.
2. Click **New Email**.
3. Type an appropriate subject line for the template (i.e., UNDELIVERABLE, or Out of Office, etc.). Then type an automatic reply message in the body of the template. (See "Email Communications for Departing Attorneys," available online at <https://www.osbplf.org/>. Select Practice Management, and then select Forms.)
4. Click the **File** tab. Select **Save As**. The Save As dialog box will appear.
5. In the **Save as type** field, select **Outlook Template**.
6. In the **File name** field, type a name for your template. (Before you click Save, confirm the folder location of your template.)
7. Click **Save**.

Create a Rule

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. Look for **Start from a blank rule**. Select **Apply rule on messages I receive**.
5. Click **Next**.
6. Select the condition **where my name is in the To or Cc box**.
7. Click **Next**.
8. Under Step 1, select action(s) **permanently delete it**. (When you select "permanently delete it," Outlook will automatically add select **stop processing more rules**.) Select additional action **reply using a specific template**.
9. Under Step 2, edit the rule description by clicking the underlined words, **a specific template**. The Select a Reply Template dialog box will appear.
10. In the **Look in:** field, select **User Templates in File System**. Then click **Browse** to find the message template you created above.
11. Select the message template. Click **Open**.
12. Click **Next**.
13. In this example, there are no exceptions to the rule. Do not select any exceptions.
14. Click **Next**.
15. In the **Specify a name for this rule** field, type a name for your rule.
16. Confirm **Turn on this rule** is checked (and if necessary, **Run this rule now on messages already in "Inbox"**).
17. Click **Finish**.

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