

SETTING UP 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 Microsoft Outlook 2016, but the steps described below may be helpful in setting automated rules in other email programs.

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. 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**).

IMPORTANT NOTICES

This material is provided for informational purposes only and does not establish, report, or create the standard of care for attorneys in Oregon, nor does it represent a complete analysis of the topics presented. Readers should conduct their own appropriate legal research. The information presented does not represent legal advice. This information may not be republished, sold, or used in any other form without the written consent of the Oregon State Bar Professional Liability Fund, except that permission is granted for Oregon lawyers to use and modify these materials for use in their own practices. © 2019 OSB Professional Liability Fund