

Rules can be used to automatically process incoming (when it arrives in the Inbox) or outgoing (when it is sent) mail based on conditions you set. Please note that outgoing message rules cannot be created from a template (please see the “Rules #1 - Creating Rules” quick reference guide).

There are 4 basic steps to creating a rule from a template:

- 1) Select a template
- 2) Select the conditions that must be met in order for the rule to be executed.
- 3) Select the actions to be taken if the conditions are met.
- 4) Select any exceptions.

When using a template, steps 2 and 3 are automatically set based on the template you have selected.

There are other methods for creating rules:

- Rules can also be created starting from a blank rule. As no template is used, there are no default conditions and actions selected.
- Rules can also be created directly from an incoming email message.
- Rules can also be applied to Automatic Replies (also known as away notifications or out-of-office notifications).

Please see the quick reference guides for help on these topics.

### Create a New Rule- Using a template

- On the **File** tab, select **Info** and click on **Rules and Alerts**



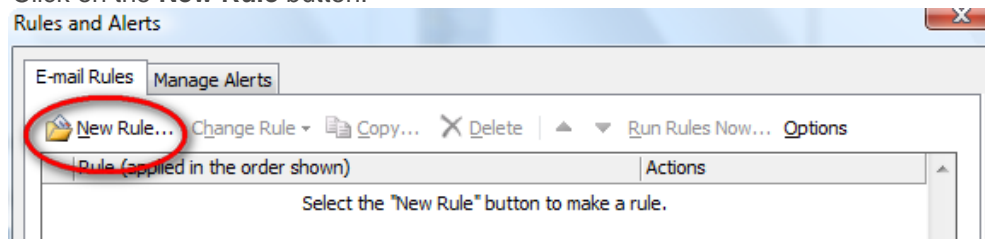
#### Rules and Alerts

Use Rules and Alerts to help organize your incoming e-mail messages, and receive updates when items are added, changed, or removed.

- OR... when displaying your mail folders, on the **HOME** tab, click on **Rules and Manage Rules and Alerts**



- The Rules and Alerts window will be displayed.
- Click on the **New Rule** button.



### 1. Select a Template

- The Rules wizard window will be displayed.
- Under **Step 1: Select a template** pick a template. There are **Stay Organized** templates and **Stay Up to Date** templates.
- Click on **Next**.

### 2. Conditions

- By using a template the default conditions are already selected (indicated by a check mark ).
- If you want to add additional conditions, click on the condition(s) to add.
- Under **Step 2: Edit the rule description (click an underlined value)** complete the conditions by clicking on the underlined value and selecting/entering the value(s).
- Click on **Next**.

### 3. Actions

- By using a template the default actions are already selected (indicated by a check mark .
- If you want to add additional actions, click on the action(s) to add.
- Under **Step 2: Edit the rule description (click an underlined value)** complete the actions by clicking on the underlined value and selecting/entering the value(s).
- Click on **Next**.

### 4. Exceptions

- If there are any exceptions to the rule, select the exception(s) (step 1) and edit the rule description(s) (step 2). Click on **Next**.
  - Finish Rule Setup:
    - If desired, change the default name of the rule.
    - By default the rule is turned “on” and will start processing new email.
    - If you want the rule to process email currently in your Inbox, select **Run this rule now on messages already in “Inbox”**.
    - Click on **Finish**.
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