

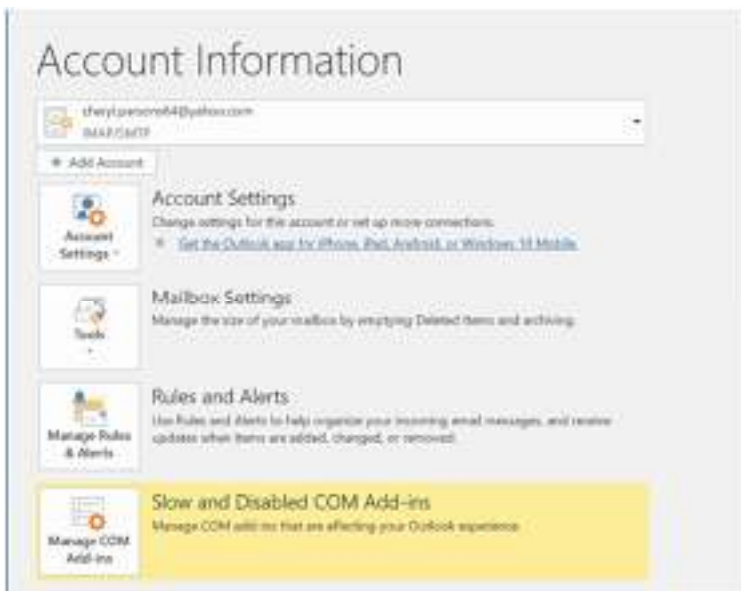


Outlook - Manage and organize: Rules

Forward and redirect email automatically

Use rules to reply to incoming emails when you're away

When you click **File** in Outlook, you should see a screen that looks something like this:



If you see a button that says **Automatic Replies**, see [Send automatic out of office replies from Outlook](#). Otherwise, use the following steps to create a template to reply to messages and set up Outlook to reply to every message you receive.

Create an out-of-office template

1. In Outlook, create a new email message.
2. Enter a subject and message body for your out-of-office template.



3. Select **File > Save As**.
4. Give your template a name and in the **Save as type** drop-down, select **Outlook Template (*.oft)**.
5. You can change the location for your template, but you can also pick the default location, which is usually `c:\users\username\AppData\Roaming\Microsoft\Templates`. Click **Save**.



Outlook - Manage and organize: Rules

You can create a new template every time you're out of the office or reuse an existing template. Now you're ready to use that template to create your Out of Office rule.

Create an out-of-office rule

1. Select the **File > Manage Rules & Alerts**.
2. In the **Rules and Alerts** dialog box, on the **E-mail Rules** tab, click **New Rule**.



3. Under **Start from a blank rule**, click **Apply rule on messages I receive** and click **Next**.
4. To reply to every email message you receive, leave the **Step 1** and **Step 2** boxes unchanged and click **Next** again. Select **Yes** when Outlook asks you if you want to apply this rule to all messages.
5. Under What do you want to do with the message, in **Step 1: Select action(s)**, select **reply using a specific template**.
6. Under **Step 2: Edit the rule description**, click the underlined text for **a specific template**.
7. In the **Look In** box at the top of the **Select a Reply Template** box, select **User Templates in File System**.
8. Select the template you created above, and then select **Open** and **Next**.
9. You can add any necessary exceptions, then select **Next**.
10. Give your rule a name, for example, Out of Office.

By default, **Turn on this rule** is checked. If you're ready to turn on your out of office reply now, select **Finish**. Otherwise, uncheck this box. You can turn the rule on at a later date.

Note: In order to have the rule send automatic replies to your email messages while you're gone, you must leave Outlook running.

Turn on a rule

If you created your out of office template and rule a few days before you needed it, turn the rule on using the following steps.

1. Select the **File > Manage Rules & Alerts**.
2. In the **Rules and Alerts** dialog box, on the **E-mail Rules** tab, find the rule you created and check the box to the left of the rule. Then select **OK**.



Outlook - Manage and organize: Rules

Send automatic out of office replies

There are two ways to send automatic out-of-office replies. The way you use depends on the type of email account you have.

Click **File**, then select the image below that matches your version of Outlook.



If you see the **Automatic Replies** button, follow the steps to set up an automatic reply.



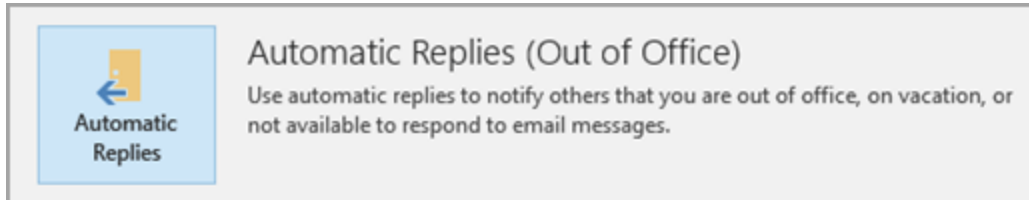
If you don't see the **Automatic Replies** button, follow the steps to use rules to send an out of office message.



Outlook - Manage and organize: Rules

Set up an automatic reply

1. Select **File > Automatic Replies**.



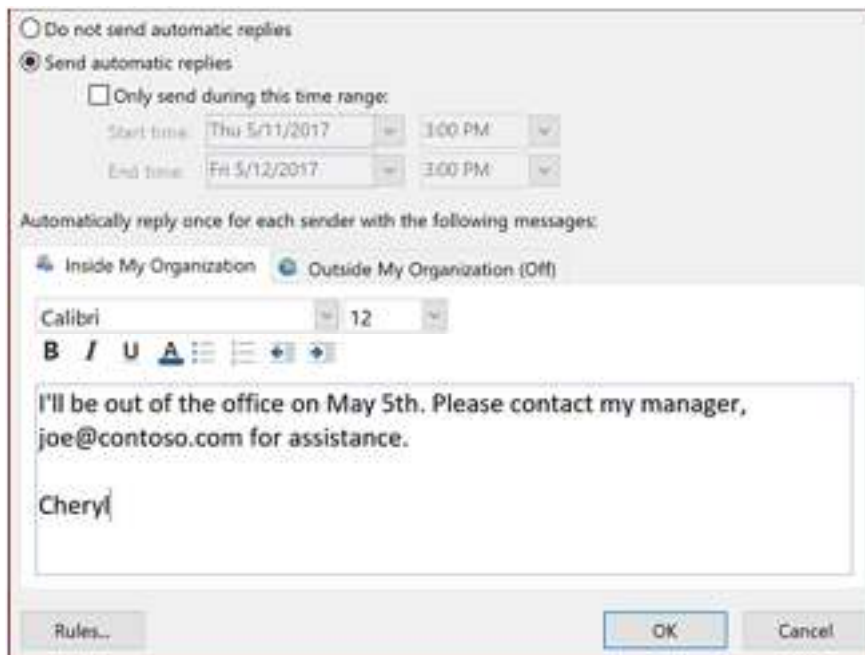
Note: For **Outlook 2007** choose **Tools > Out of Office Assistant**.

2. In the **Automatic Replies** box, select **Send automatic replies**.

Optionally, set a date range for your automatic replies. This will turn off automatic replies at the date and time you enter for the end time. Otherwise, you'll need to turn off automatic replies manually.

Note: If you don't see **Automatic Replies**, use Rules and Alerts to set up your out-of-office message.

3. On the **Inside My Organization** tab, type the response that you want to send to teammates or colleagues while you are out of the office.



Note: Sending automatic replies to **anyone outside my organization** will send your automatic reply to every email, including newsletters, advertisements, and potentially, junk email. If you want to send automatic replies to those outside your organization, we recommend choosing **My contacts only**.

4. Select **OK** to save your settings.



Outlook - Manage and organize: Rules

Turn off automatic out-of-office replies

When Outlook is setup to send automatic replies, you'll see a message under the ribbon with this information. Select **Turn off** to disable automatic out-of-office replies. If you want to modify the dates for your automatic reply or the message sent, use the steps above to modify your settings.

Note: For **Outlook 2007**, to turn off out-of-office replies, select **Tools > Out of Office Assistant** and uncheck the **Send Out of Office auto-replies** checkbox.



Troubleshooting: I don't see Automatic Replies

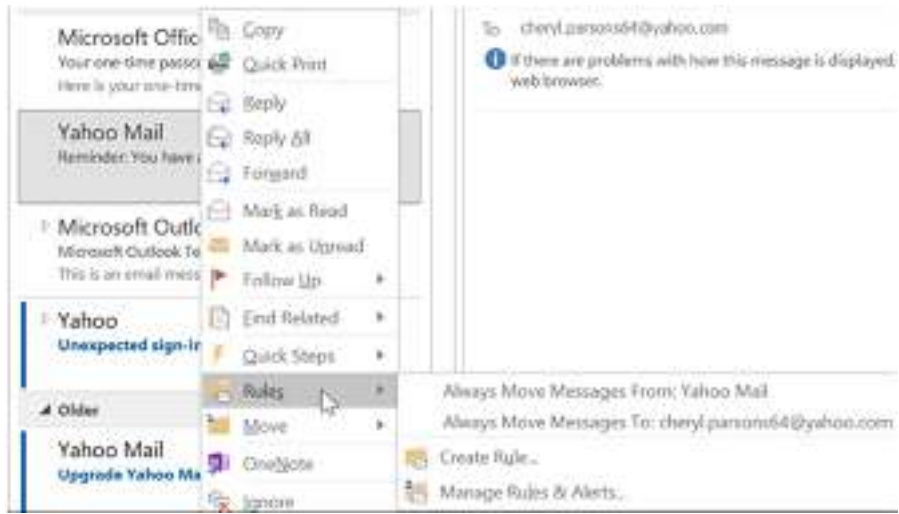
If you don't see Automatic Replies after selecting File, you're probably using a Gmail, Yahoo, or other POP or IMAP account that doesn't support the Outlook Automatic Replies feature. You can setup a rule that will reply to incoming messages, but only if you leave Outlook running.

Manage email messages by using rules

Rules allow you to move, flag, and respond to email messages automatically. You can also use rules to play sounds, move messages to folders, or display new item alerts.

The easiest and most common rule to create is one that allows you to move an item from a certain sender or with certain words in the subject line to another folder. You can create this rule directly from a message you've already received.

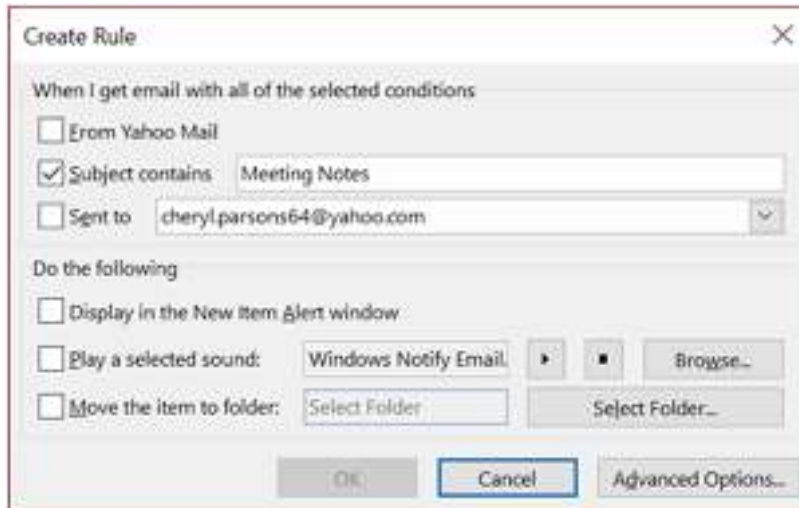
1. Right-click a message in your inbox or another email folder and select **Rules**.



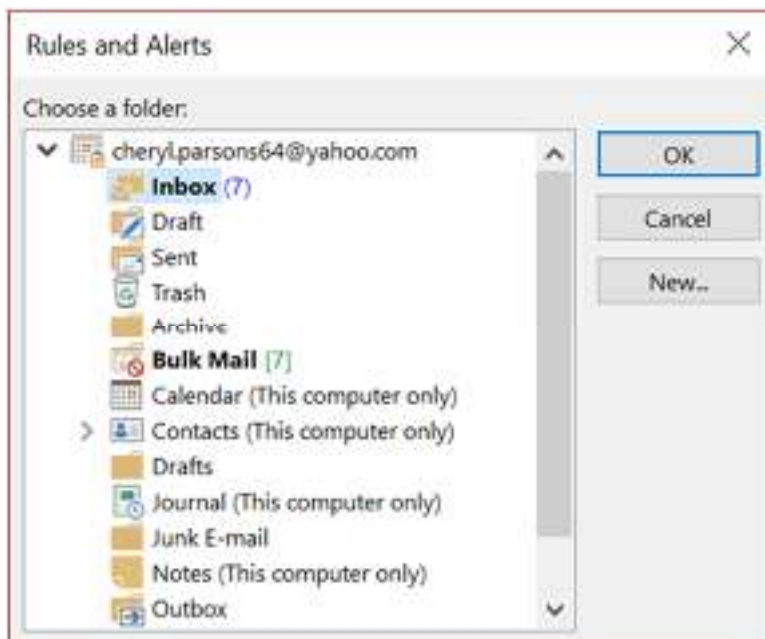


Outlook - Manage and organize: Rules

2. Select one of the options. Outlook automatically suggests creating a rule based on the sender and the recipients. To view more options, select **Create Rule**.
3. In the **Create Rule** dialog box, select one or more of the first three checkboxes.



4. In the **Do the following** section, if you want the rule to move a message to a folder, check the **Move item to folder** box, then select the folder from the **Select Folder** dialog that pops up, and then click **OK**.



5. Click **OK** to save your rule.

Note: If you want to run the rule on messages you've already received, check the box on the confirmation dialog that pops up and then click **OK**.



Outlook - Manage and organize: Rules

Create a rule using the Rules Wizard

There are three types of rules you can create with the Rules Wizard.

- **Stay organized:** These rules help you filter, file, and follow-up with messages.
- **Stay up to date:** These rules notify you when you receive a message that fits a specific set of criteria.
- **Custom rules:** These are rules you create without a template.

Rules are almost infinitely customizable. There are a variety of options you can set for each type of rule you create. Use the following steps to learn how to create a rule using the Rules Wizard.

Step 1

1. Select **File > Manage Rules & Alerts** to open the **Rules and Alerts** dialog box.
2. On the **Email Rules** tab, select **New Rule**.
3. Select one of the templates from **Step 1**. To start from a blank rule, select **Apply rule on messages I receive** or **Apply rule on messages I send**.
4. In the **Step 2: Edit the rule description** box, click on any underlined options to set them. For example, if you selected **Flag messages from someone for follow-up** in Step 1, click **people or public group** to select which senders' messages you want to flag, then click **follow up at this time** to select a flag and a follow up date.
5. Click **Next**.

Step 2

On the second page of the Rules Wizard, you can add additional conditions to your rule. For example, you can select messages sent from a specific person that also have specific words in the subject or message body.

1. In the **Step 1: Select condition(s) box**, any condition you set on the previous screen is checked. You can select multiple additional conditions by checking their checkboxes.
2. In the **Step 2: Edit the rule description** box, click on any additional underlined conditions you just added. Then click **Next**.

Step 3

On the third page of the Rules Wizard, you can select additional actions to take on the message. For example, you can flag messages for follow up and mark a message as high importance.

1. In the **Step 1: Select condition(s) box**, any action you set on the first screen is checked. You can select multiple additional actions by checking their checkboxes.
2. In the **Step 2: Edit the rule description** box, click on any additional underlined actions you just added. Then click **Next**.

Step 4

On the fourth page of the Rules Wizard, you can add any exceptions to your rule. For example, you can check except if it is marked as importance to ensure that any messages marked with a specific importance level aren't flagged for follow up.



Outlook - Manage and organize: Rules

1. In the **Step 1: Select condition(s) box**, select any exceptions to your rule by checking their checkboxes.
2. In the **Step 2: Edit the rule description box**, click on any additional underlined exceptions you just added. Then click **Next**.


Step 5

1. On the last page of the Rules Wizard, enter a name for your rule.
2. If you want to run this rule on messages you've already received, check **Run this rule now on messages already in "Inbox."**
3. By default, **Turn on this rule** is checked. You can uncheck this box if you don't want the rule to be turned on at this time.
4. Click **Finish** to save and turn on your rule.

Delete a rule

Delete a rule

You can delete a rule when it's no longer necessary.

1. On the **File** tab, choose **Manage Rules & Alerts**.
2. In the **Rules and Alerts** dialog box, on the **E-mail Rules** tab, choose the rule you want to delete.
3. Choose **Delete**  > **OK**.

For more information, please refer to the Microsoft training resource page [HERE](#)