



IT Help and Support

Federal Transit Administration—Office of Information Technology

MS Outlook — Creating a Rule to Sort Messages

Background

Creating a rule in Microsoft Outlook helps users stay organized and up to date with messages. Rules are used most often to automatically move incoming messages from a certain sender to a specific folder or to display a special alert in relation to a certain sender.

Scope

This document applies to creating a rule in Microsoft Outlook 2010 and later.

Create a New Rule in Outlook

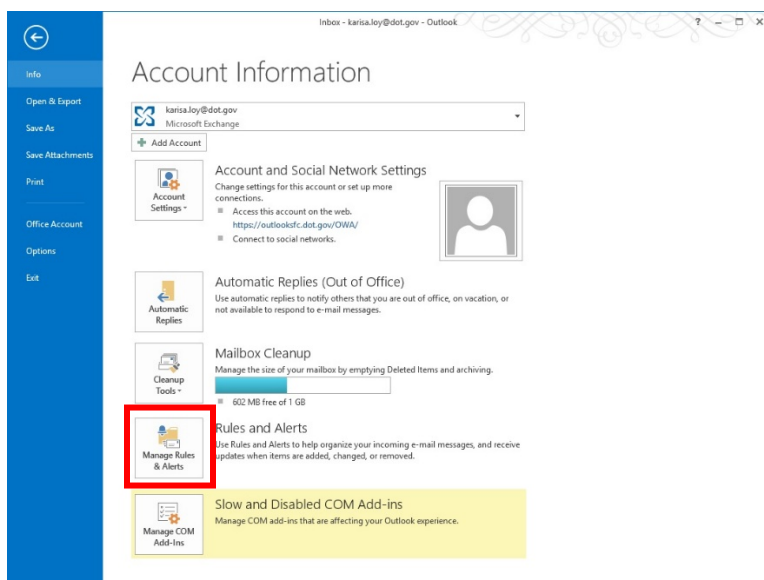
This document will show how to create a new inbox rule that sends all messages that have been received from a particular sender to a specified Inbox folder. These rules can be created by selecting different options, but in all cases the user will follow similar steps.

The steps in this section describe how to create a new rule through your Outlook Settings page.

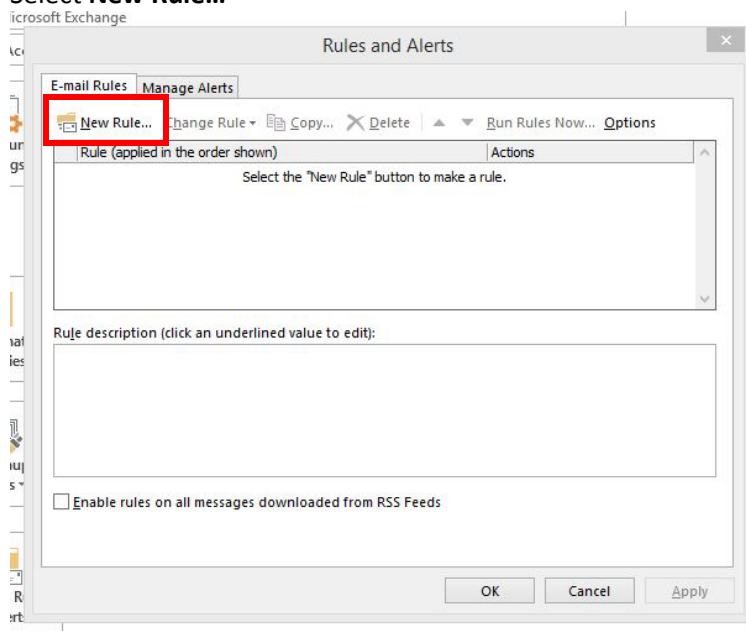
1. Select the **File** tab.



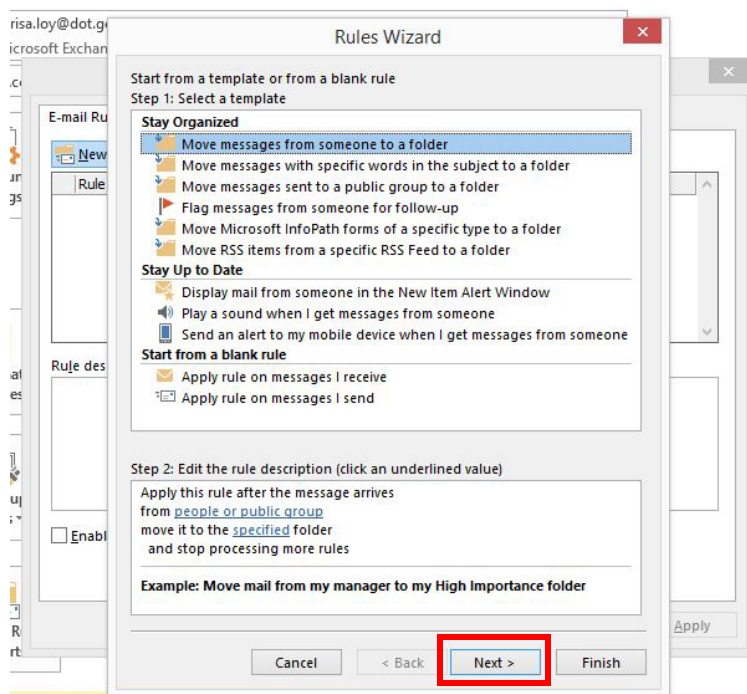
2. Click on **Manage Rules & Alerts**.



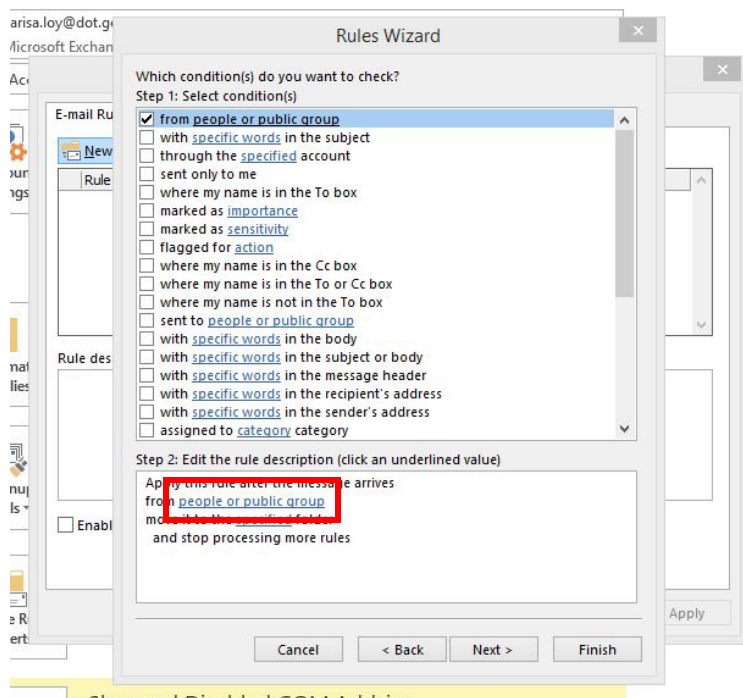
3. Select **New Rule...**



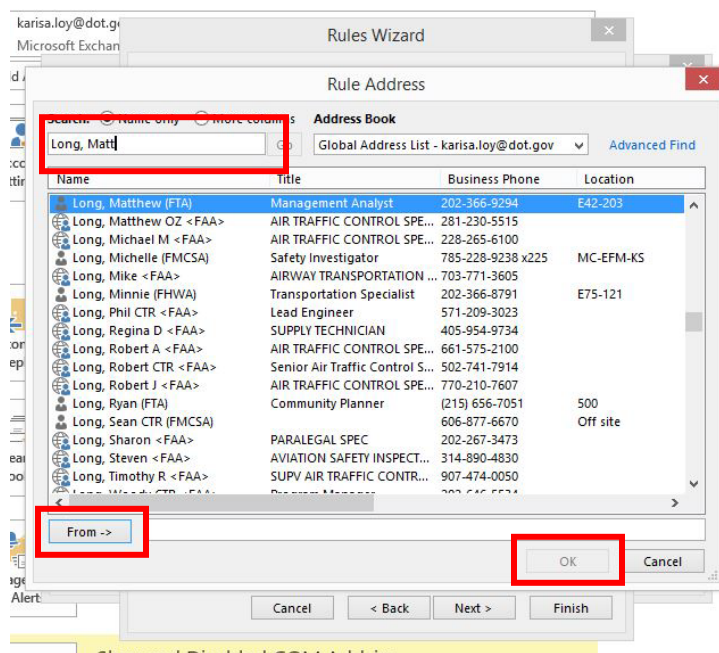
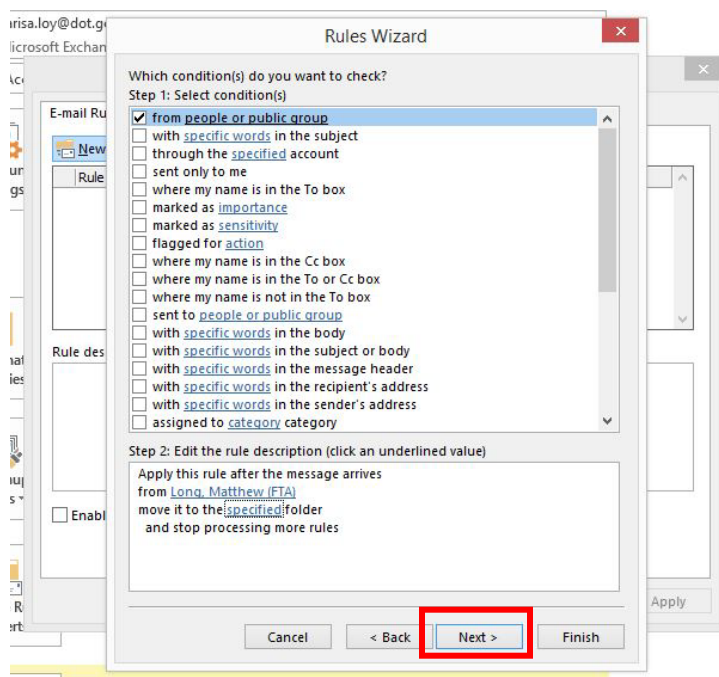
4. In Step 1, select **Move messages from someone to a folder**.
5. Click **Next >**.

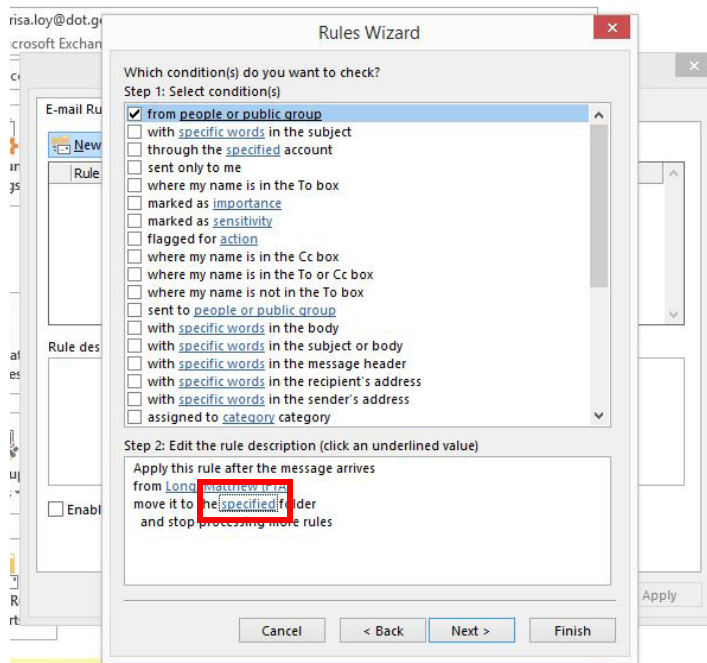


6. In Step 1, check the box beside **from people or public group**.
7. In Step 2, select **people or public group**.

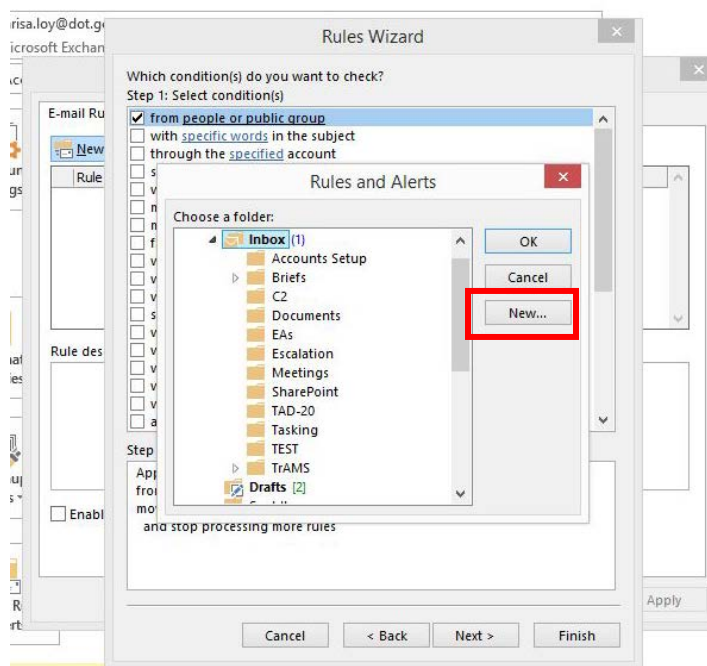


8. **Enter** the senders name into the search bar if the sender is in your address book.
9. **Select** the desired sender.
10. Select **From ->**.
11. If the sender is not in your address book, enter their email address into the **From ->** bar.

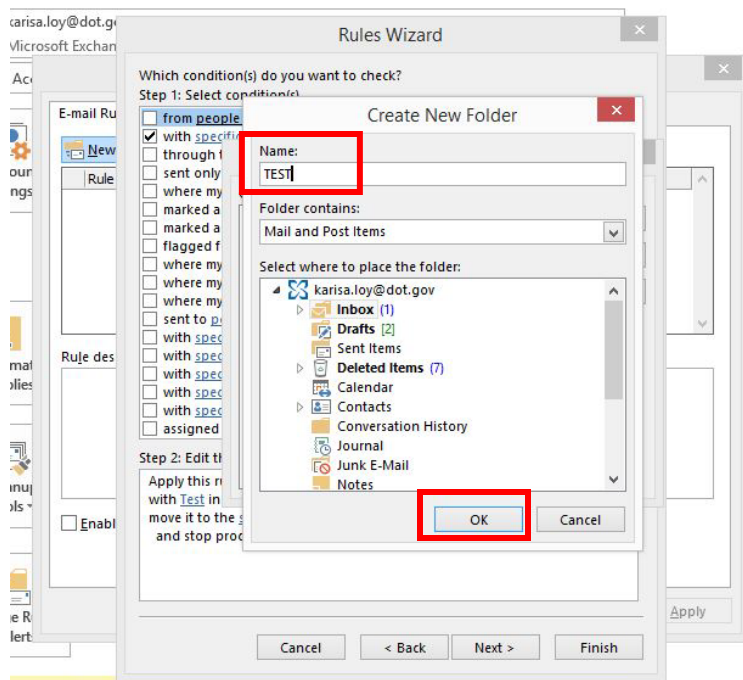
12. Select **OK**.13. Click **Next >**.14. In Step 2, click **specified**.



15. Create a new folder if there is no existing folder you would like to move the incoming messages to by selecting **New...**

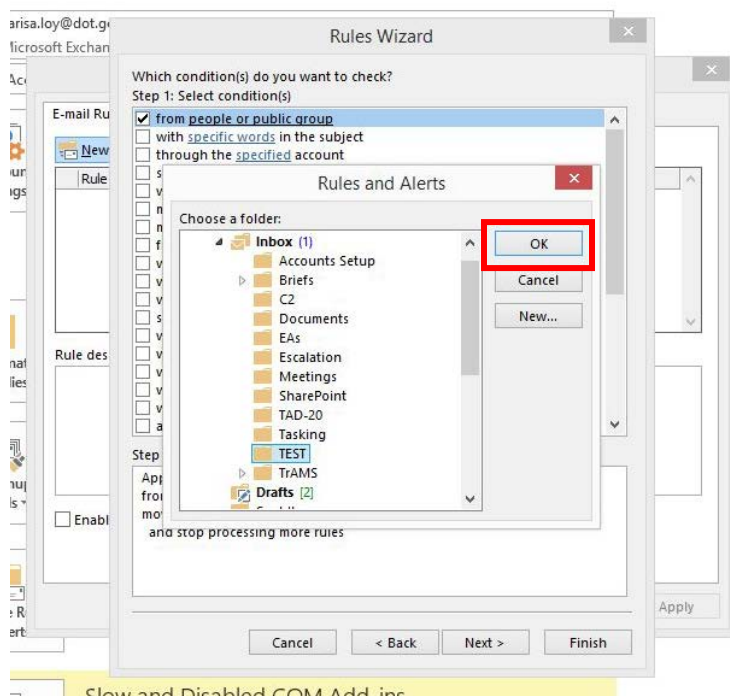


16. Enter the **Name** of your new folder into the top bar.
17. Click **OK**.



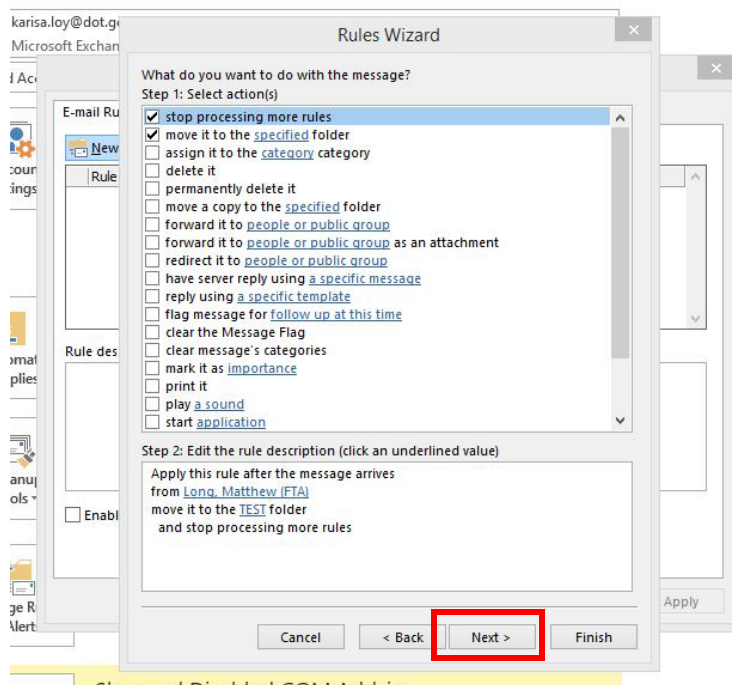
18. **Select** the existing folder you would like to move the incoming messages to.

19. Select **OK**.



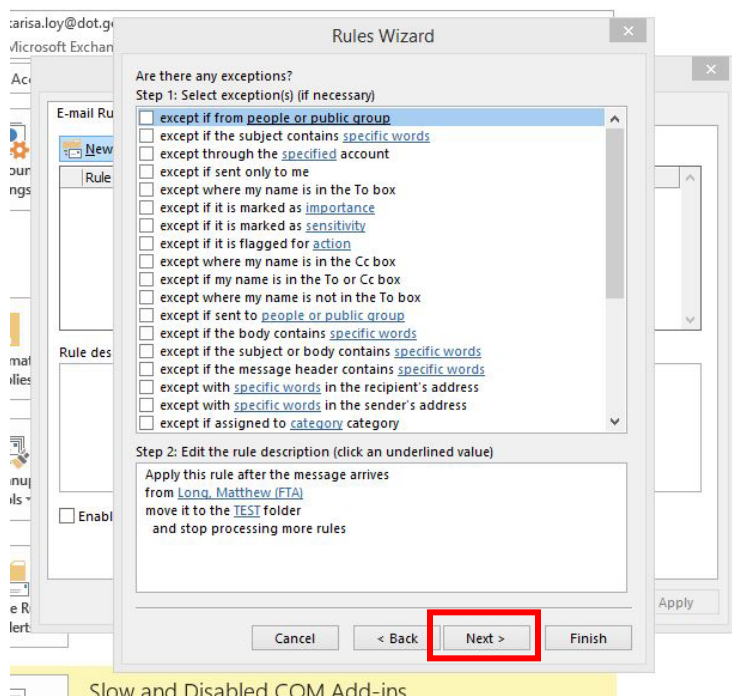
20. In Step 1, check the box beside **move it to the specified folder**.

21. Click **Next >**.



22. If there are any exceptions, **check the box** beside the listed exception.

23. Click **Next >**.

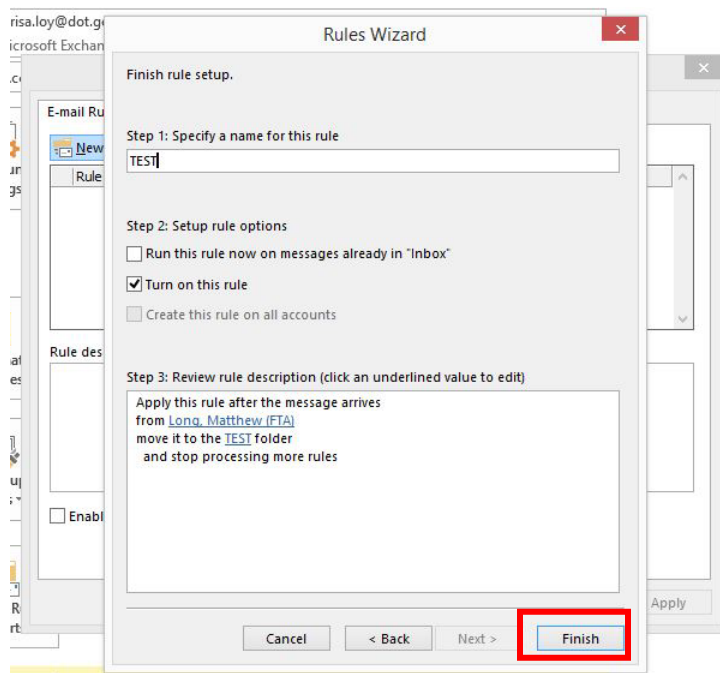


24. In Step 1, enter the **name of the new rule**.

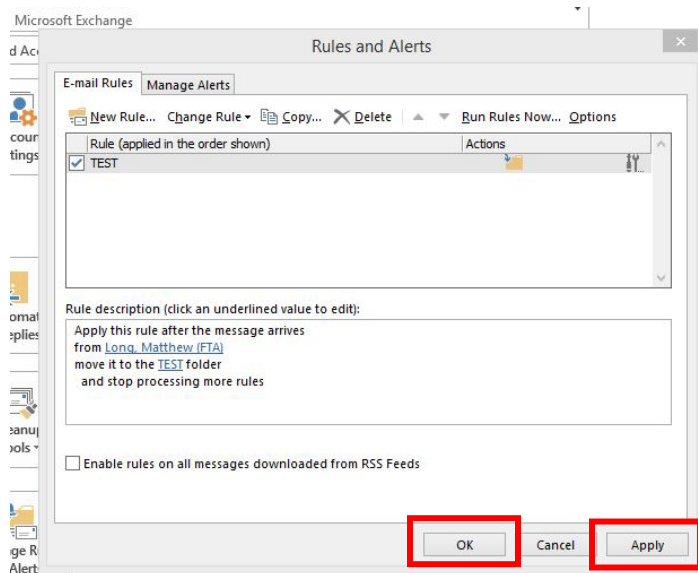
25. In Step 2, click the box beside **Run this rule now on messages already in "Inbox"** if you would like this rule to apply to any messages already in your inbox.

26. In Step 2, click the box beside **Turn on this rule** if you would like this rule to apply to all future messages received.

27. In Step 3, **review** the rule description and ensure that it states what you would like the new rule to do.
28. Click **Finish**.



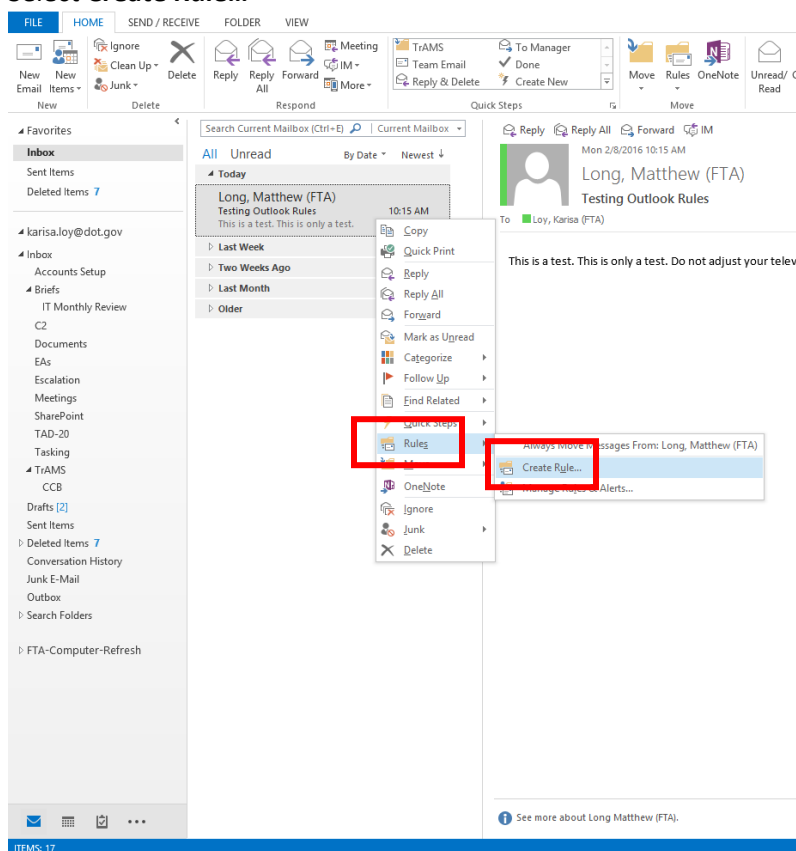
29. **Check** the box next to your new rule.
30. Click **Apply**.
31. Click **OK**.



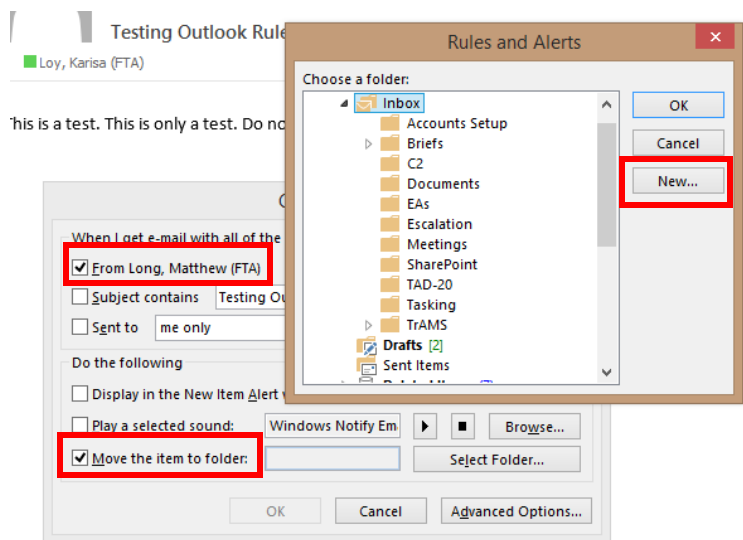
Create a New Rule from a Message

The steps in this section describe how to create a new rule based off of a selected message. This example will show how to have all messages that have been received from a sender go automatically to a specified Inbox folder.

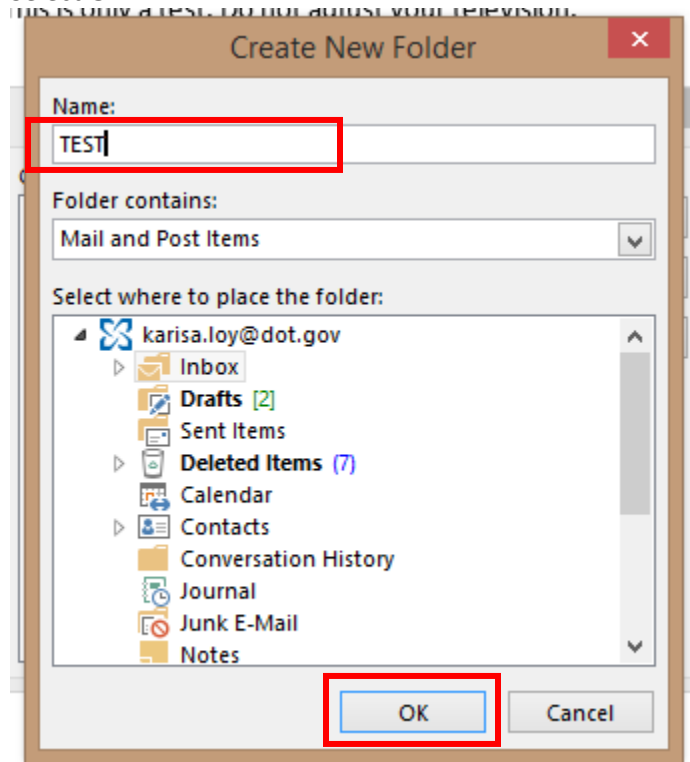
1. Right-click the message you would like to base the rule off of.
2. Hover over **Rules**.
3. Select **Create Rule...**



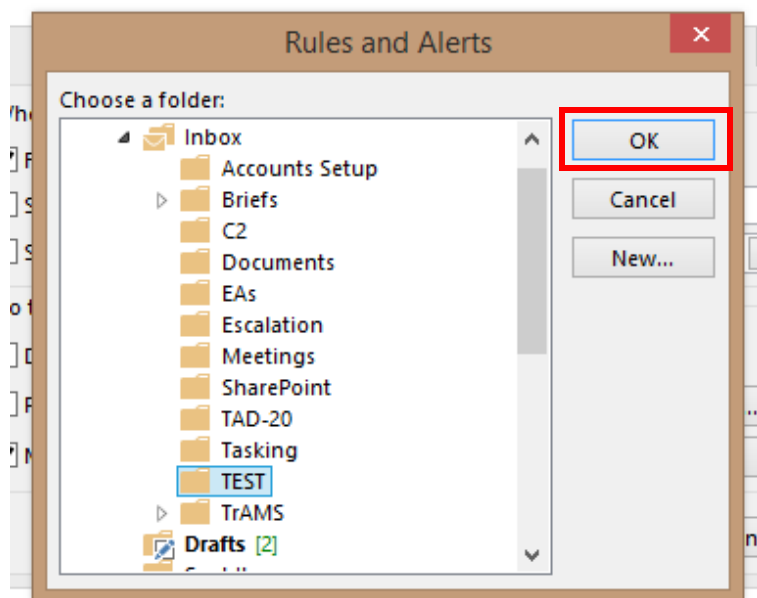
4. **Check** the box beside the sender whose messages you would like to be moved.
5. **Check** the box beside "Move the item to folder:".
6. Select the folder you would like the messages to be moved to if one already exists.
7. If a folder does not already exist, select **New...**



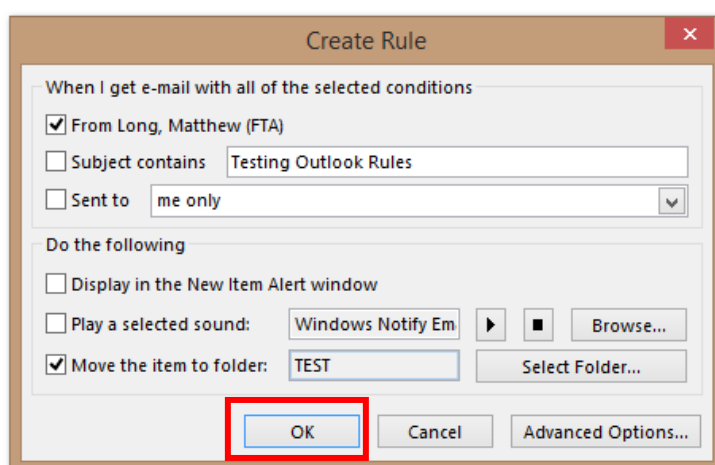
8. Enter the name of the new folder in the top text box.
9. Select **OK**.



10. Select **OK**.



11. Review the rule.
12. Select **OK**.



For More Information

For additional questions or comments, contact the IT Service Desk at [5-Help](#) (202-385-4357 or toll free 866-466-5221) or Tim Pemberton (202-366-7410) in the FTA Office of Information Technology, TAD-20.