



## Creating Mail Rules for Outlook

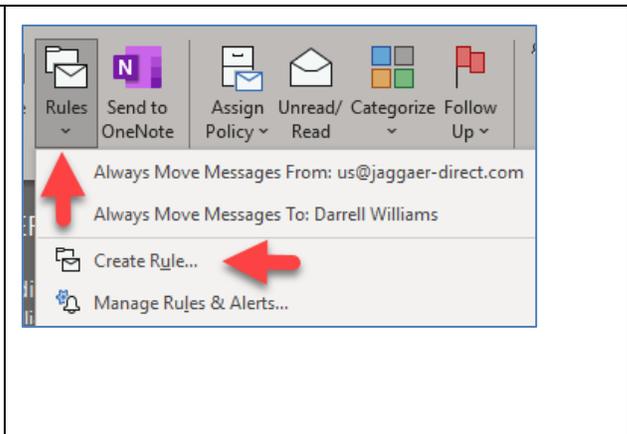
### Introduction

This job aid contains instructions on how to set up a rule in Outlook to send emails to a folder based on where the email is coming from based on the extension. There are multiple options to control emails and this is a guide to manage the traffic coming from Jaggaer.

### Outlook – Creating Mail Rules

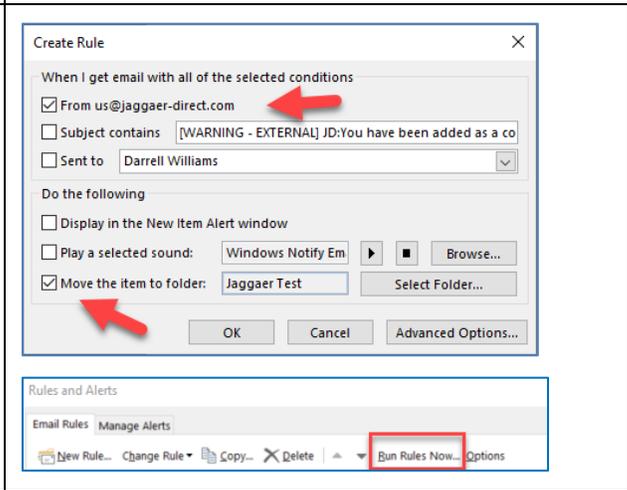
These below instructions are to be used to set up rules in Outlook – if you have another browser please utilize an internet browser look-up.

1. Select Rules and then Create Rule



2. If email is highlighted first option needs to be selected  
 3. Select Move to Item folder  
 4. Select folder from drop down

- You can just click OK here and be done if you are using an actual email address (not a partial). All other steps are extra/not needed if moving the emails to an existing folder.
- If you want to run the rule against what is already in the inbox (to move them), open it up in "Manage Rules and Alerts" and click "Run Rules Now"



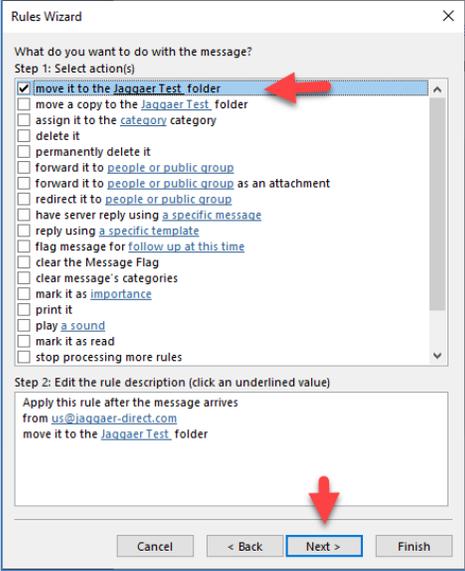
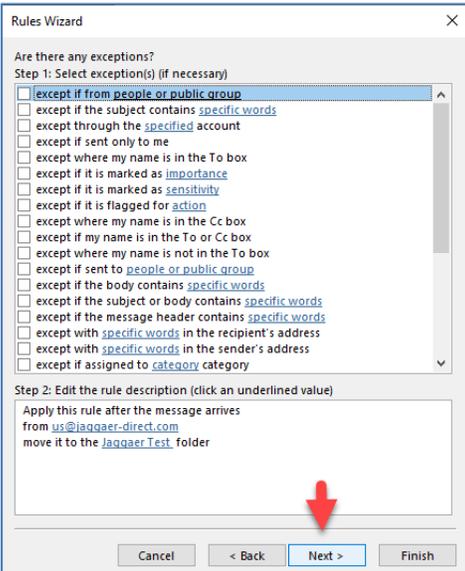


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<p>5. Select Advanced Options</p>	<p>The 'Create Rule' dialog box shows the following settings: 'When I get email with all of the selected conditions' section includes 'From us@jaggaer-direct.com' (checked), 'Subject contains [WARNING - EXTERNAL] JD:You have been added as a co' (unchecked), and 'Sent to Darrell Williams' (selected in a dropdown). The 'Do the following' section includes 'Display in the New Item Alert window' (unchecked), 'Play a selected sound: Windows Notify Em' (selected), and 'Move the item to folder: Select Folder' (selected). The 'Advanced Options...' button at the bottom right is highlighted with a red arrow.</p>
<p>6. Success button will appear – select radio button and then Ok 7. Select Next</p>	<p>The 'Success' dialog box displays a yellow warning icon and the message: 'The rule "us@jaggaer-direct.com" has been created.' Below this, the checkbox 'Run this rule now on messages already in the current folder' is checked. The 'OK' button is highlighted with a red arrow.</p>
<p>8. Select condition and then next</p>	<p>The 'Rules Wizard' dialog box is at 'Step 1: Select condition(s)'. The list of conditions includes 'from us@jaggaer-direct.com' (checked), 'with [WARNING - EXTERNAL] JD:You have been added as... in the subject', 'sent to Darrell Williams', 'with [WARNING - EXTERNAL] JD:You have been ... in the subject or body', 'through the specified account', 'sent only to me', 'where my name is in the To box', 'marked as importance', 'marked as sensitivity', 'flagged for action', 'where my name is in the Cc box', 'where my name is in the To or Cc box', 'where my name is not in the To box', 'with specific words in the body', 'with specific words in the message header', 'with specific words in the recipient's address', 'with specific words in the sender's address', and 'assigned to category category'. The 'from us@jaggaer-direct.com' condition is highlighted with a red arrow. Below the list, 'Step 2: Edit the rule description (click an underlined value)' shows 'Apply this rule after the message arrives from us@jaggaer-direct.com'. The 'Next &gt;' button at the bottom is highlighted with a red arrow.</p>

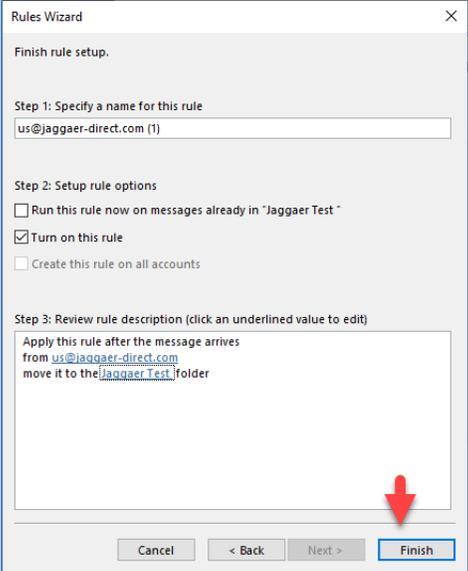


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<p>9. Verify first option is selected for folder and select next</p>	
<p>10. No action needed here – select next</p>	



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<p>11. Verify information 12. Select Finish</p>	
<p>13. End Job aid</p>	