



## Creating Mail Rules for Outlook

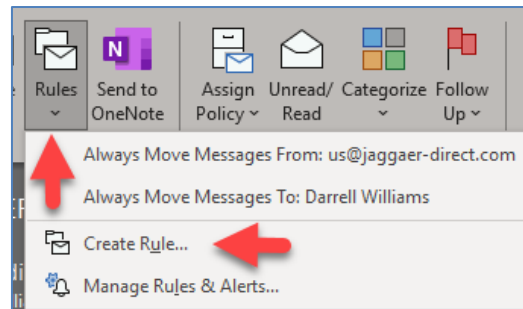
### Introduction

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.

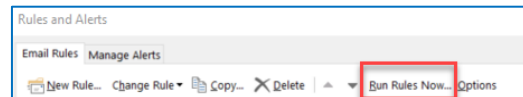
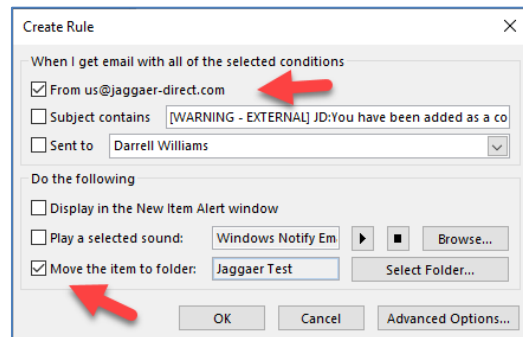
### Outlook – Creating Mail Rules

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"





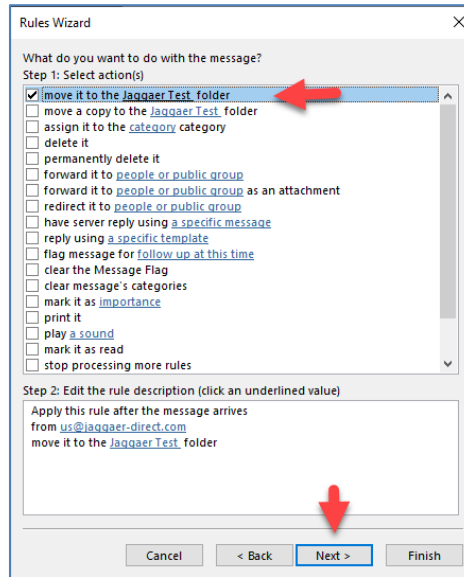
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<p>5. Select Advanced Options</p>	<p>The 'Create Rule' dialog box shows the following settings:</p> <ul style="list-style-type: none"> <li>When I get email with all of the selected conditions:             <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> From us@jaggaer-direct.com</li> <li><input type="checkbox"/> Subject contains [WARNING - EXTERNAL] JD:You have been added as a co</li> <li><input type="checkbox"/> Sent to Darrell Williams</li> </ul> </li> <li>Do the following:             <ul style="list-style-type: none"> <li><input type="checkbox"/> Display in the New Item Alert window</li> <li><input type="checkbox"/> Play a selected sound: Windows Notify Em [Browse...]</li> <li><input type="checkbox"/> Move the item to folder: [Select Folder] [Select Folder...]</li> </ul> </li> </ul> <p>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 the following message:</p> <p>The rule "us@jaggaer-direct.com" has been created.</p> <p><input type="checkbox"/> Run this rule now on messages already in the current folder</p> <p>The 'OK' button at the bottom center is highlighted with a red arrow.</p>
<p>8. Select condition and then next</p>	<p>The 'Rules Wizard' dialog box shows the following settings:</p> <p>Which condition(s) do you want to check? Step 1: Select condition(s)</p> <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> from us@jaggaer-direct.com</li> <li><input type="checkbox"/> with [WARNING - EXTERNAL] JD:You have been added as... in the subject</li> <li><input type="checkbox"/> sent to Darrell Williams</li> <li><input type="checkbox"/> with [WARNING - EXTERNAL] JD:You have been ... in the subject or body</li> <li><input type="checkbox"/> through the specified account</li> <li><input type="checkbox"/> sent only to me</li> <li><input type="checkbox"/> where my name is in the To box</li> <li><input type="checkbox"/> marked as importance</li> <li><input type="checkbox"/> marked as sensitivity</li> <li><input type="checkbox"/> flagged for action</li> <li><input type="checkbox"/> where my name is in the Cc box</li> <li><input type="checkbox"/> where my name is in the To or Cc box</li> <li><input type="checkbox"/> where my name is not in the To box</li> <li><input type="checkbox"/> with specific words in the body</li> <li><input type="checkbox"/> with specific words in the message header</li> <li><input type="checkbox"/> with specific words in the recipient's address</li> <li><input type="checkbox"/> with specific words in the sender's address</li> <li><input type="checkbox"/> assigned to category</li> </ul> <p>Step 2: Edit the rule description (click an underlined value)</p> <p>Apply this rule after the message arrives from us@jaggaer-direct.com</p> <p>The 'Next &gt;' button at the bottom center is highlighted with a red arrow.</p>

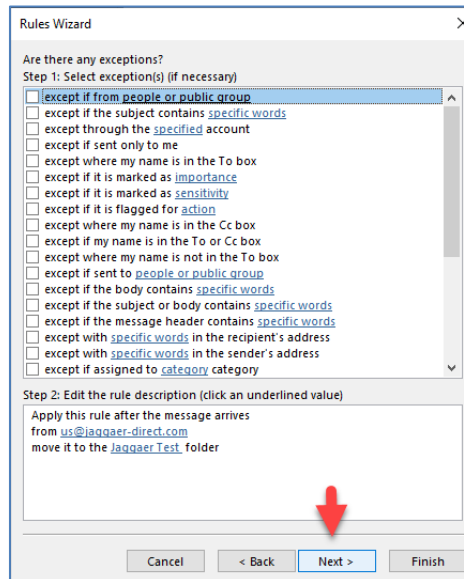


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9. Verify first option is selected for folder and select next

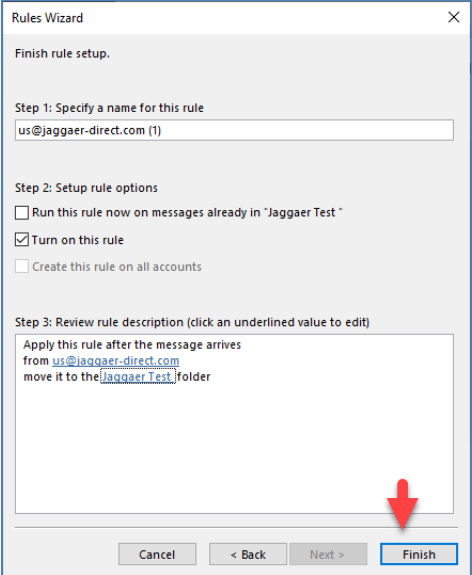


10. No action needed here – select next





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