

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. M Ν Rules Send to Assign Unread/ Categorize Follow OneNote Policy ~ Read Up ~ Always Move Messages From: us@jaggaer-direct.com Always Move Messages To: Darrell Williams 1. Select Rules and then Create Rule Create Rule... D Manage Rules & Alerts.. × Create Rule When I get email with all of the selected conditions 2. If email is highlighted first option needs to be From us@jaggaer-direct.com Subject contains [WARNING - EXTERNAL] JD:You have been added as a co selected Sent to Darrell Williams 3. Select Move to Item folder \sim 4. Select folder from drop down Do the following You can just click OK here and be done if you are Display in the New Item Alert window using an actual email address (not a partial). All other Play a selected sound: Windows Notify Em Browse... steps are extra/not needed if moving the emails to an Move the item to folder: Jaggaer Test Select Folder.. existing folder. ОК Cancel Advanced Options... If you want to run the rule against what is already in the inbox (to move them), open it up in "Manage Rules and Alert Rules and Alerts" and click "Run Rules Now" Email Rules Manage Alerts 📻 New Rule... Change Rule 🕶 🖹 Copy... 🗙 Delete 🗎 🔺 Run Rules Now.

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5.	Select Advanced Options	Create Rule × When I get email with all of the selected conditions Image: Promus@jaggaer-direct.com Subject contains Subject contains [WARNING - EXTERNAL] JD:You have been added as a co Image: Sent to Darrell Williams Image: Do the following Image: Display in the New Item Alert window Image: Play a selected sound: Windows Notify Em Image: Move the item to folder: Select Folder Image: OK Cancel
6. 7.	Success button will appear – select radio buttona and then Ok Select Next	Success The rule "us@jaggaer-direct.com" has been created. Run this rule now on messages already in the current folder OK OK
8.	Select condition and then next	Rules Wizard X Which condition(s) do you want to check? Step 1: Select condition(s) If from us@laqgaer.direct.com If the subject of

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Rules Wizard × What do you want to do with the message? Step 1: Select action(s) ✓ move it to the <u>Jaggaer Test</u> folder move a copy to the <u>Jacquer Test</u> folder assign it to the <u>category</u> category delete it permanently delete it forward it to people or public group forward it to people or public group as an attachment redirect it to people or public group have server reply using a specific message reply using <u>a specific template</u> flag message for <u>follow up at this time</u> clear the Message Flag 9. Verify first option is selected for folder and select clear message's categories mark it as <u>importance</u> print it next play a sound mark it as read stop processing more rules Step 2: Edit the rule description (click an underlined value) Apply this rule after the message arrives from us@iaggaer-direct.com move it to the <u>Jaggaer Test</u> folder Cancel < Back Next > Finish \times Rules Wizard Are there any exceptions? Step 1: Select exception(s) (if necessary) [except if from people or public group except if the subject contains specific words except through the specified account except if sent only to me except where my name is in the To box except if it is marked as <u>importance</u> except if it is marked as <u>sensitivity</u> except if it is flagged for action except where my name is in the Cc box except if my name is in the To or Cc box except where my name is not in the To box except if sent to <u>people or public group</u> except if the body contains <u>specific words</u> except if the subject or body contains <u>specific words</u> 10. No action needed here - select next except if the message header contains <u>specific words</u> except with <u>specific words</u> in the recipient's address except with <u>specific words</u> in the sender's address except if assigned to <u>category</u> category Step 2: Edit the rule description (click an underlined value) Apply this rule after the message arrives from <u>us@jaggaer-direct.com</u> move it to the <u>Jaggaer Test</u> folder Cancel < Back Next > Finish



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