How to Set Up Email Rules in Outlook

Below is a step-by-step guide to help you create an Outlook rule that automatically moves emails with subject lines starting with "[CIM Courses] Action Required" or "[CIM Programs] Action Required" into a specific folder.

This will cover both Outlook for Windows and Outlook for Mac.

<mark>**Set Up a Rule in Outlook (Windows Desktop App)**</mark>
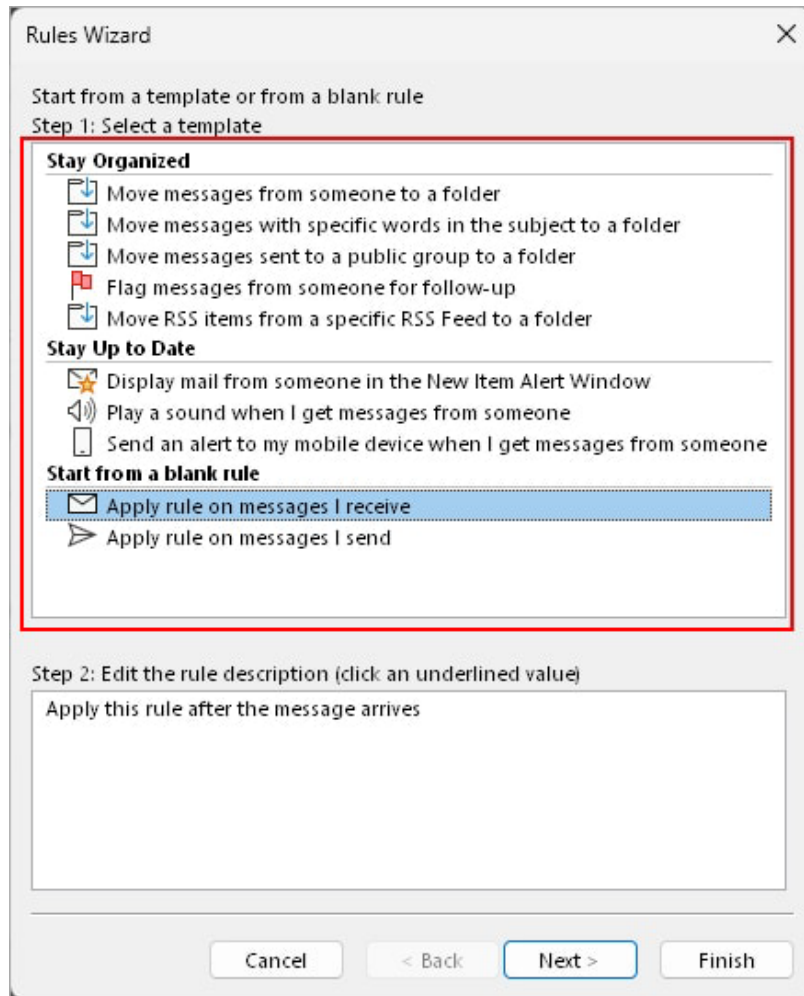
Step 1: Open Outlook
1. Launch the Outlook application on your computer.
2. Click the File tab in the top menu.
3. Select Info from the left sidebar.
4. Click Manage Rules & Alerts
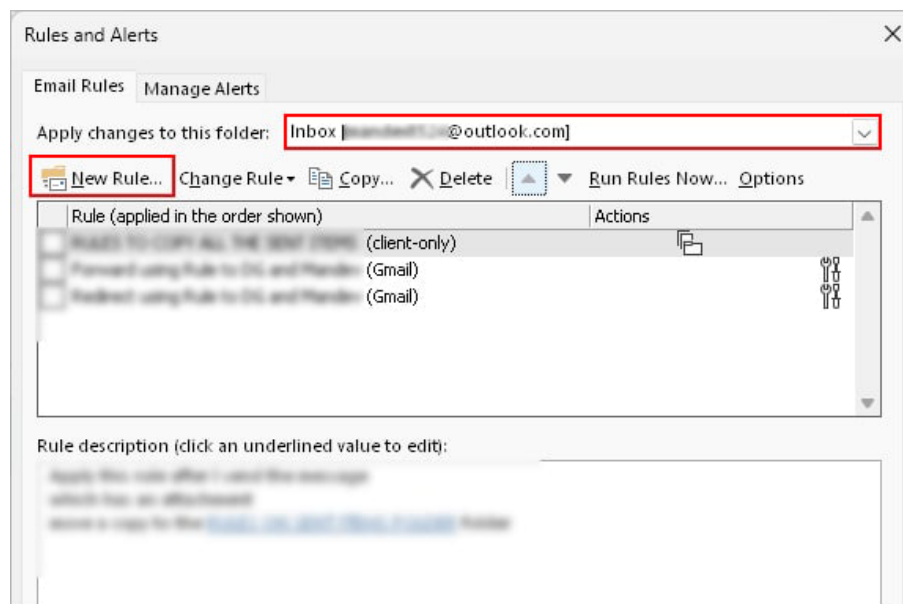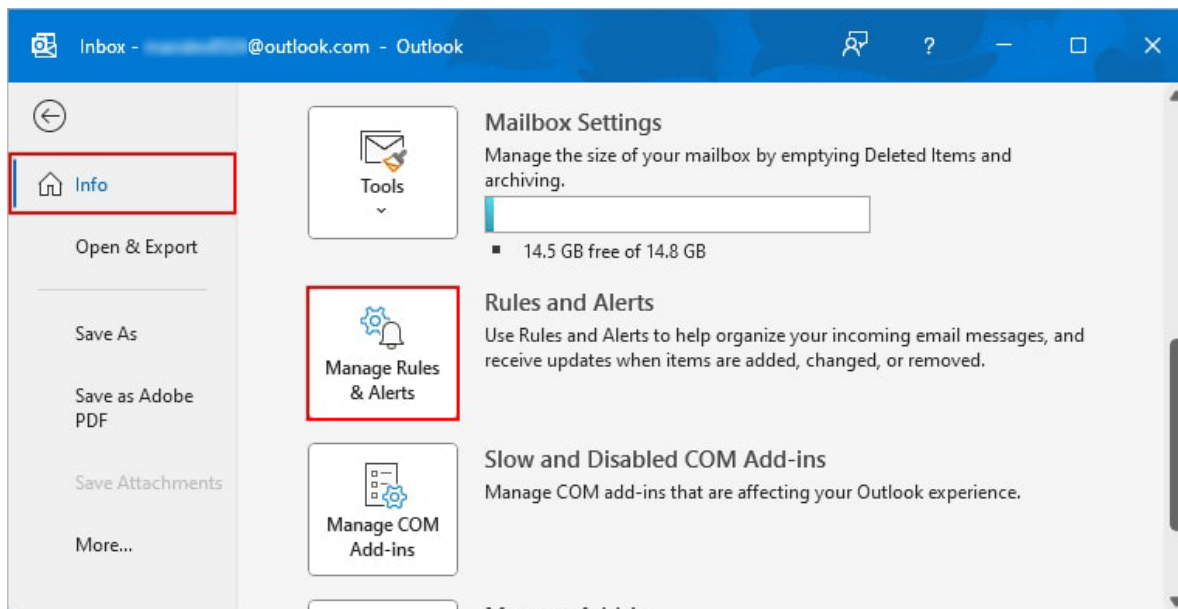
Step 2: Start a New Rule
1. In the Rules and Alerts window, click New Rule.
2. Under Start from a blank rule, select:
   a. Apply rule on messages I receive
3. Click Next.

Step 3: Set the Condition

1. Check with specific words in the subject.
2. Click the underlined specific words link in the lower pane.
3. In the pop-up:
   - Type [CIM Courses] → click **Add**
   - Type [CIM Programs] → click **Add**
4. Click OK
5. Click Next.

Step 4: Set the Action

1. Check move it to the specified folder.
2. Click the underlined specified link.
3. In the folder list:
   o Click New to create a new folder
   o Enter a name (e.g., CourseLeaf Emails)
   o Choose where to place it (e.g., Inbox)
4. Click OK
5. Click **Next**.

Rules Wizard ✕

What do you want to do with the message?
Step 1: Select action(s)

☐ stop processing more rules
☑ move it to the specified folder
☐ assign it to the category category
☐ delete it
☐ permanently delete it
☐ move a copy to the specified folder
☐ 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 a specific template
☐ flag message for follow up at this time
☐ clear the Message Flag
☐ clear message's categories
☐ mark it as importance
☐ print it
☐ play a sound
☐ mark it as read

Step 2: Edit the rule description (click an underlined value)

Apply this rule after the message arrives
with '[CIM Courses]' or '[CIM Programs]' in the subject
move it to the specified folder

Cancel   < Back   Next >   Finish

Rules and Alerts ✕

Choose a folder:

⌄ E ███████
   📄 Sent Items
   🗑 Deleted Items
   📄 Archive
 > 📅 Calendar
 > 🗏 Contacts
 > 📄 Conversation History
   📓 Journal
   📭 Junk Email
   📄 Notes
   📤 Outbox
   📰 RSS Feeds

OK
Cancel
New...

Step 5: Set Exceptions (Optional)

- If needed, select any exceptions (e.g., exclude messages from certain people).
- Otherwise, leave everything unchecked and click Next.

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 importance
- ☐ except if it is marked as sensitivity
- ☐ 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 people or public group
- ☐ except if the body contains specific words
- ☐ except if the subject or body contains specific words
- ☐ except if the message header contains specific words
- ☐ except with specific words in the recipient's address
- ☐ except with specific words in the sender's address
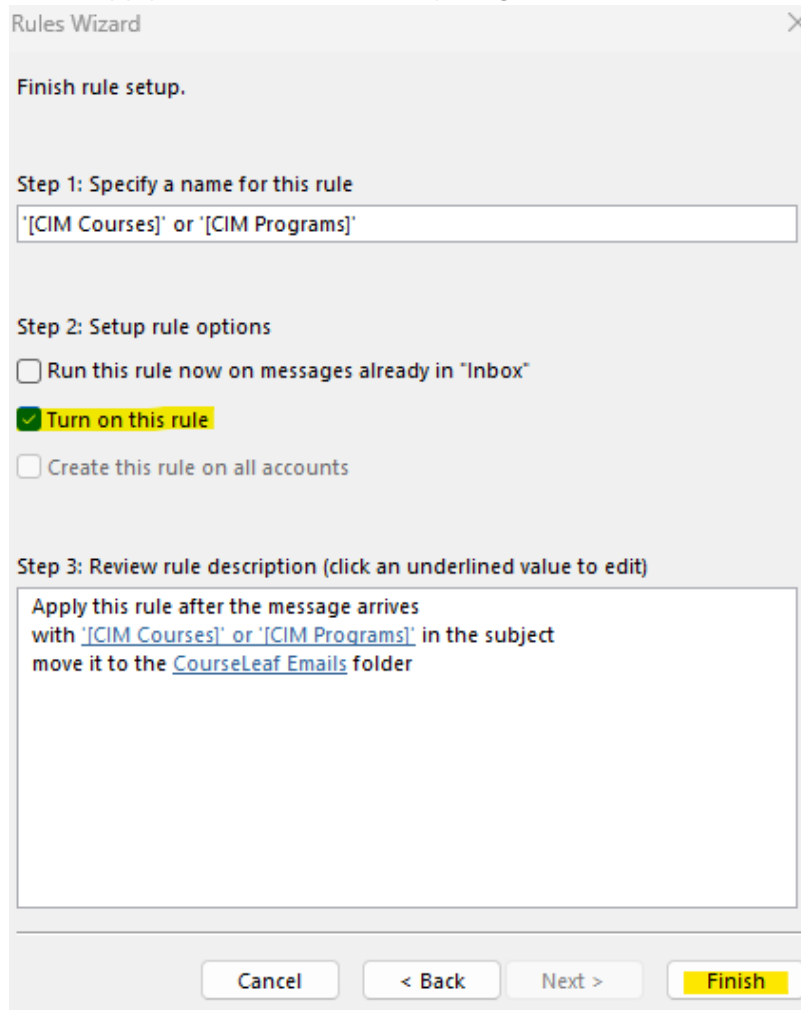- ☐ except if assigned to category category

Step 2: Edit the rule description (click an underlined value)

Apply this rule after the message arrives
with '[CIM Courses]' or '[CIM Programs]' in the subject
move it to the CourseLeaf Emails folder

Cancel   < Back   Next >   Finish

Step 6: Finish and Apply the Rule
1. Give your rule a name (e.g., CIM Emails).
2. Check Turn on this rule.
3. Click Finish.
4. Click Apply, then OK to save everything.

Rules Wizard   ✕

Finish rule setup.

Step 1: Specify a name for this rule

'[CIM Courses]' or '[CIM Programs]'

Step 2: Setup rule options

☐ Run this rule now on messages already in "Inbox"

☑ Turn on this rule

☐ Create this rule on all accounts

Step 3: Review rule description (click an underlined value to edit)

Apply this rule after the message arrives
with '[CIM Courses]' or '[CIM Programs]' in the subject
move it to the CourseLeaf Emails folder

Cancel   < Back   Next >   Finish

Test the Rule
Send a test email with one of the matching subject lines to confirm:
- It skips the inbox
- And lands directly in your CourseLeaf Emails folder

Notes
- You can edit, delete, or copy this rule at any time by returning to Manage Rules & Alerts.
- If you want the rule to apply to existing emails, right-click the folder > Rules > Apply Rules Now.

Before you start: Make sure you are using the Outlook desktop app (not just Outlook in the web browser).

Step 1: Open Outlook
1. Launch the Outlook app on your Mac.
2. Make sure you are in Mail view (look at the left sidebar).

Step 2: Create the Target Folder (if needed)
1. In the sidebar, right-click your account or Inbox.
2. Select New Folder.
3. Name the folder (e.g., **From John Doe**).
4. Press Enter and the folder should now appear in your folder list.
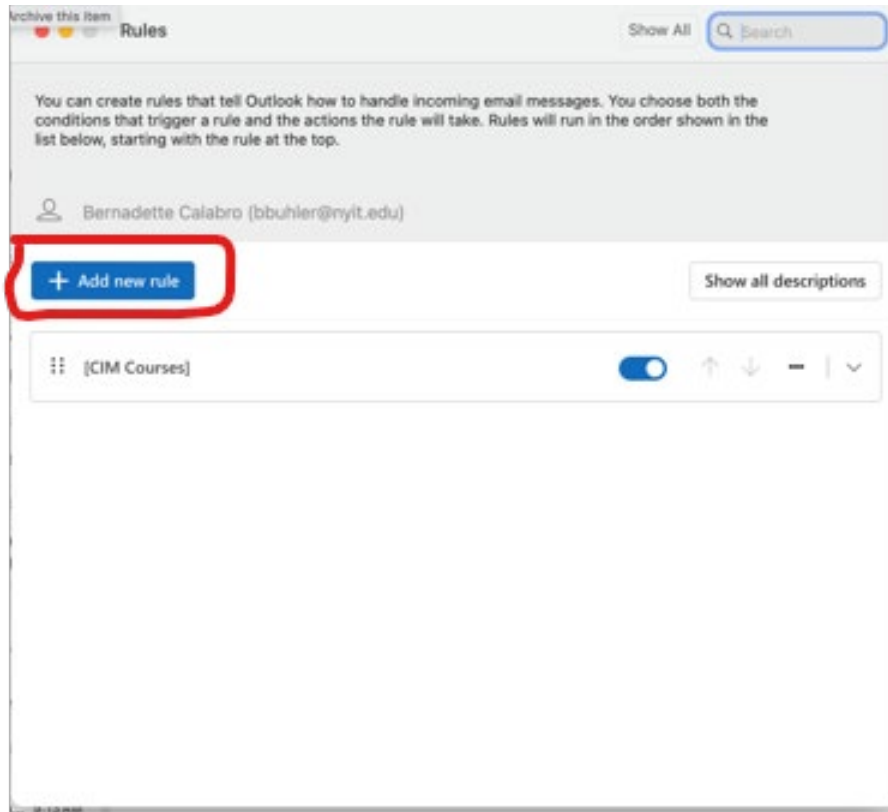
Step 3: Open the Rules Window
1. On the top menu bar, click Tools.
2. Select Rules from the dropdown.
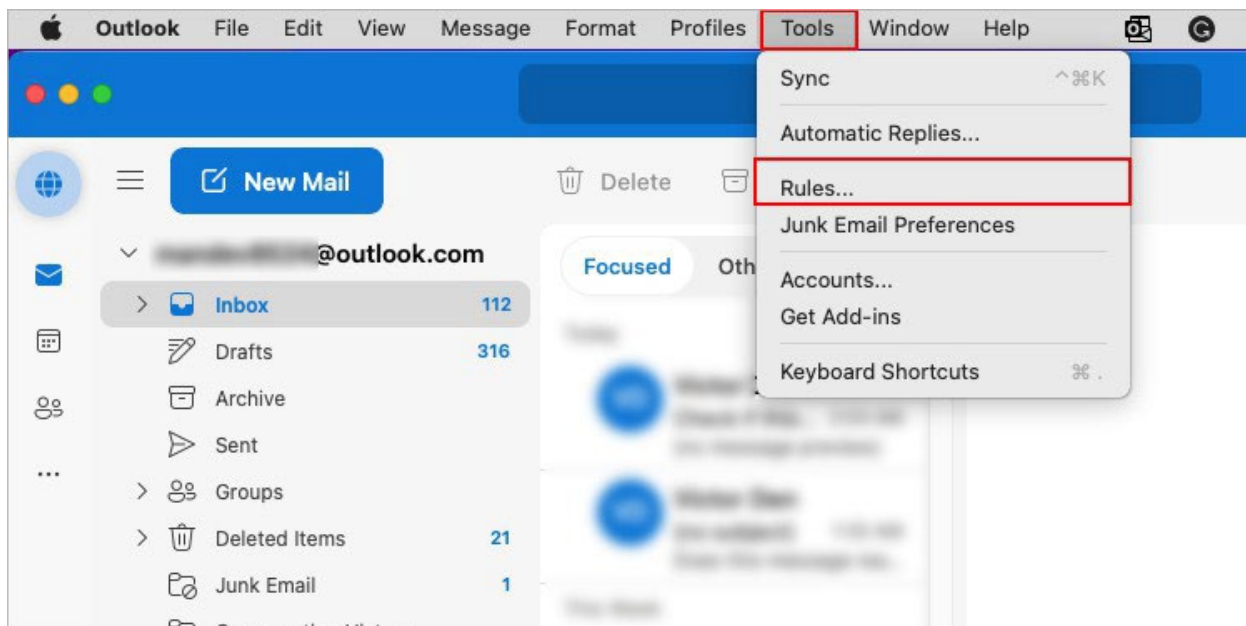
Step 4: Choose Account
In the Rules window:
1. Select the account you want (e.g., Exchange, Outlook.com, or whatever your work account is).
2. Click the + button to add a new rule.

Step 5: Define the Rule
In the **Edit Rule** window:

Name the Rule:
- Type a descriptive name, like Move emails from johndoe@example.com.

When a new message arrives that meets all these conditions:
- **Condition 1:**
    - From → Is → johndoe@example.com (or whichever address you want)

Do the following:
Move → Choose Folder → select the folder you created earlier (From John Doe).

Step 6: Adjust Additional Options (Optional)
- You can add other conditions if needed (like subject contains, sent to, etc.).
- You can also choose whether to stop processing other rules if this one applies.

Step 7: Save the Rule
1. Click OK to save the rule.
2. Close the Rules window.

Step 8: Test the Rule
Send a test email from that address to yourself (or wait for a real one) and confirm:
1. It bypasses the inbox and

2. Lands directly in the target folder.

Notes
- If you want to apply the rule to existing emails, after creating it, go to the folder, right-click, and use Rules > Apply Rules.

For more information, you can visit the Microsoft Website and Inside the Web or email Jessica Triola at jtriola@nyit.edu.