Automate common or repetitive tasks with Quick Steps and manage email messages by using Rules.

**QUICK STEPS**

**Default Quick Steps in Outlook 2013:**

<table>
<thead>
<tr>
<th>Quick Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>Move to:</em></td>
<td>Moves the selected message to a mail folder that you specify and marks the message as read.</td>
</tr>
<tr>
<td><em>To Manager:</em></td>
<td>Forwards the message to your manager. If your organization uses Microsoft Exchange Server, your manager's name is detected in the Global Address List and inserted in the &quot;To&quot; box, or you can specify the recipient.</td>
</tr>
<tr>
<td><em>Team E-mail:</em></td>
<td>Forwards the message to others in your team. If your organization uses Microsoft Exchange Server, your team members names are detected in the Global Address List and inserted in the &quot;To&quot; box.</td>
</tr>
<tr>
<td><em>Done:</em></td>
<td>Moves the message to a specified mail folder, marks the message complete, and then marks it as read.</td>
</tr>
<tr>
<td><em>Reply &amp; Delete:</em></td>
<td>Opens a reply to the selected message, and then deletes the original message.</td>
</tr>
<tr>
<td><em>Create New:</em></td>
<td>Create your own Quick Step to execute any sequence of commands, name it, and then apply an icon to help you identify it.</td>
</tr>
</tbody>
</table>
Configure or Change Existing Quick Steps:

1. In Mail, click Home tab.

2. In the Quick Steps group, click the More arrow at the side of the Quick Steps box, and then click Manage Quick Steps.

3. In the Quick Step box, click the Quick Step that you want to change, and then click Edit.

4. Under Actions, change or add the actions that you want this Quick Step to do.

5. If you want, in the Shortcut key box, click a keyboard shortcut that you want to assign to that Quick Step.

6. If you want to change the icon for a Quick Step, click an icon next to the Name box, click an icon, and then click OK.

Create a Quick Step

1. In Mail, click Home tab.

2. In the Quick Steps group, in the Quick Steps gallery, click the Create New Quick Step.

3. Click an action type from the list or click Custom.

4. In the Name box, type a name for the new Quick Step.

5. Click the icon button next to the Name box, click an icon, and then click OK.

6. Under Actions, choose an action that you want the Quick Step to do. Click Add Action for any additional actions.

7. To create a keyboard shortcut, in the Shortcut key box, click the keyboard shortcut that you want to assign.
Note: New Quick Steps appear at the top of the gallery on the Home tab in the Quick Steps group. Although changed Quick Steps keep the same location in the gallery, you can rearrange, duplicate, and delete them in Manage Quick Steps.

RULES

Unlike Quick Steps, rules typically are always on and run automatically. For example, when a message is received from a specified person, it’s automatically moved to the folder that you designate. Outlook includes rule templates for common scenarios. Use these rule templates, or design your own custom rules.

Create a rule using template

1. Click the File tab.
2. Click Manage Rules & Alerts.
3. In the Rules and Alerts dialog box, on the E-mail Rules tab, click New Rule.
4. Under Step 1: Select a template, select the template that you want from the Stay Organized or Stay Up to Date collection of templates.
5. Under Step 2: Edit the rule description, click an underlined value. For example, if you click the people or public group link, the Address Book opens.
6. Click Next.
7. Under **Step 1: Select condition(s)**, select the conditions that you want the messages to meet for the rule to apply.

8. Under **Step 2: Edit the rule description**, click an underlined value for any condition that you added, and then specify the value.

9. Click **Next**.

10. Under **Step 1: Select action(s)**, select the action that you want the rule to take when the specified conditions are met.

11. Under **Step 2: Edit the rule description**, click an underlined value for any action that you added, and then specify the value.

12. Click **Next**.

13. Under **Step 1: Select exception(s)**, select any exceptions to the rule, and then click **Next**.

14. Under **Step 2: Edit the rule description**, click an underlined value for any exception that you added, and then specify the value.

15. Click **Next**.

16. Under **Step 1: Specify a name for this rule**, enter a name.

17. Under **Step 2: Setup rule options**, select the check boxes for the options that you want.

   - If you want to run this rule on messages that already are in the **Inbox**, select the **Run this rule now on messages already in “Inbox”** check box.
   - By default, the new rule is turned on. To turn off the rule, clear the **Turn on this rule** check box.
   - To apply this rule to all email accounts set up in Outlook, select the **Create this rule on all accounts** check box.

18. Click **Finish**.
Design a custom rule

1. Click the File tab.
2. Click Manage Rules & Alerts.
3. In the Rules and Alerts dialog box, on the E-mail Rules tab, click New Rule.
4. Under Start from a blank rule, click either Check messages when they arrive or Check messages after sending.
5. Click Next.
6. Under Step 1: Select condition(s), select the conditions that you want the messages to meet for the rule to apply.
7. Under Step 2: Edit the rule description, click an underlined value for any condition that you added, and then specify the value.
8. Click Next.
9. Under Step 1: Select action(s), select the action that you want the rule to take when the specified conditions are met.
10. Under Step 2: Edit the rule description, click an underlined value for any action that you added, and then specify the value.
11. Click Next.
12. Under Step 1: Select exception(s), select any exceptions to the rule, and then click Next.
13. Under Step 2: Edit the rule description, click an underlined value for any exception that you added, and then specify the value.
14. Click Next.
15. Under Step 1: Specify a name for this rule, enter a name.
16. Under Step 2: Setup rule options, select the check boxes for the options that you want.
   o If you want to run this rule on messages that already are in the Inbox, select the Run this rule now on messages already in “Inbox” check box.
Create a rule based on senders or recipients of a message

A rule can be quickly created from any message. The advantage of this method is that rules are suggested based on the message sender or recipients. For example, when you start with a message, one rule that is suggested moves all messages from that sender to a folder that you choose.

1. Click the message for which you want to create a rule, and then on the Home tab, in the Move group, click Rules.

   Suggested rules appear based on the message sender and recipients.

2. Do one of the following:
   o Click one of the suggested rules, click a destination folder, and then click OK.
   o For more rules options that are based on the sender, recipients, or subject of the message, click Create Rule.

If you chose Create Rule in step 2, the Create Rule dialog box appears. Continue as follows:

1. Under When I get e-mail with all of the selected conditions, select the check boxes for the conditions that you want.

2. Under Do the following, select the check boxes for the action that you want the rule to take when the specified conditions are met.

3. Select the Move the item to folder check box.

4. Click an existing folder or click New to create a folder to store the messages.

   To add more conditions, actions, or exceptions to the rule, click Advanced Options, and then follow the rest of the instructions in the Rules Wizard.

5. Click OK.
Delete a rule

1. Click the File tab.
2. Click Manage Rules & Alerts.
3. Select the rule you want to delete.
4. Click Delete.
5. Click OK.

Run rules manually

1. Click the File tab.
2. Click Manage Rules & Alerts.
3. Click Run Rules Now.
4. In the Run Rules Now dialog box, under Select rules to run, select the check box next to each rule that you want to run.
5. In the Run in Folder box, if you want to select a different folder, click Browse, click the folder, and then click OK.

Select the Include subfolders check box to include all folders under the folder that was specified in step 5.

6. In the Apply rules to list, the default is all messages. You can change this to read or unread messages.
7. Click Run Now.
Server-based rules versus client-only rules

There are two types of rules in Outlook — server-based and client-only.

- **Server-based rules**: When you are using a Microsoft Exchange Server account, some rules are server-based rules. These rules run on your mailbox on the Exchange mail server, even when Outlook isn’t running. Server-based rules must apply to messages when they are first delivered to your **Inbox**, and the rules must be able to run until they are completed on the server. For example, a rule that specifies that a message be printed can’t run until it is completed on the server. If a rule can’t be applied on the server, it is applied when you start Outlook and then becomes a client-only rule.

- **Client-only rules**: Client-only rules are rules that run only on your computer. These are rules that run in Outlook instead of on the Exchange server. Client-only rules can only run when Outlook is running.

If your list of rules contains both kinds of rules, the server-based rules are applied first, followed by the client-only rules.

Reference: Information adapted from [https://support.office.com](https://support.office.com)