

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

## QUICK STEPS

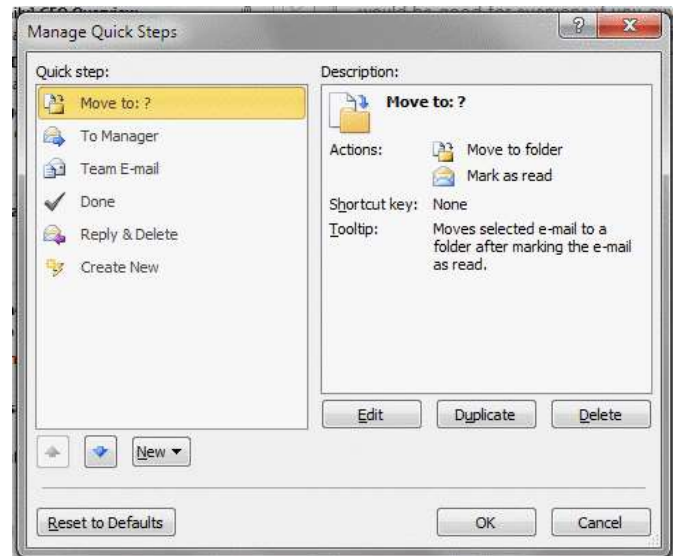
### Default Quick Steps in Outlook 2013:



Quick Step	Action
<i>Move to:</i>	Moves the selected message to a mail folder that you specify and marks the message as read.
<i>To Manager:</i>	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 "To" box, or you can specify the recipient.
<i>Team E-mail:</i>	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 "To" box.
<i>Done:</i>	Moves the message to a specified mail folder, marks the message complete, and then marks it as read.
<i>Reply &amp; Delete:</i>	Opens a reply to the selected message, and then deletes the original message.
<i>Create New:</i>	Create your own Quick Step to execute any sequence of commands, name it, and then apply an icon to help you identify it.

## 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**.



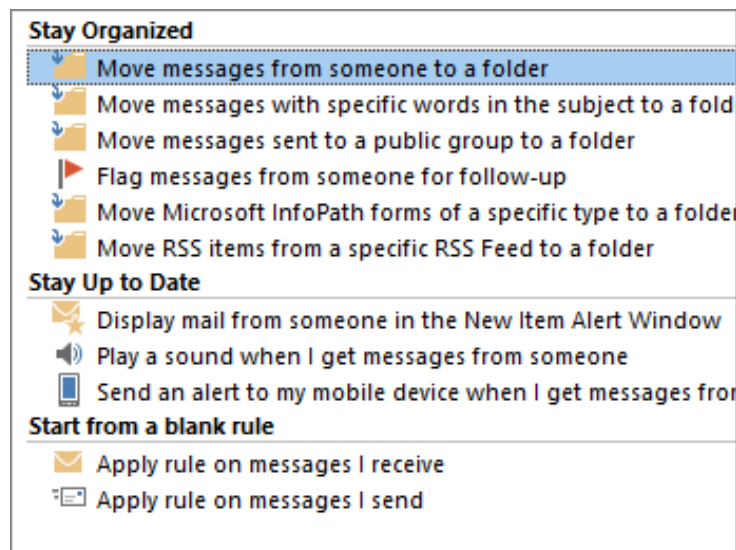
## Create a Quick Step

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**.



# Outlook Quick Steps & Rules

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.
  - 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.



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- 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.

17. Click **Finish**.

## 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:
  - Click one of the suggested rules, click a destination folder, and then click **OK**.
  - 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.

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*Reference:* Information adapted from <https://support.office.com>