How to set a rule in Outlook

Rules allow you to automate email activities in Outlook. The rule in this document will help you to automatically move Identity Finder categorized emails to the DCL3 folder (PST). To establish a new rule in Microsoft Outlook, take the following steps.

1. Rules allow you to automatically do specific commands in your inbox. In this case, we will create a rule that will automatically move all IF category emails to the DCL3 Emails folder every time Outlook is opened.

2. First, go to the Home tab on Outlook. You will see a Move group on the right in the toolbar. In that group, click the Rules button and a drop down menu will appear. From there, click Manage Rules & Alerts.
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3. A Rules and Alerts window will pop-up. Click the New Rule button.

4. In the Rules Wizard window, select the Move messages from someone to a folder option, then click Next.
5. In the Step 1 section of the window, you will be able to select the conditions you want. Check the Assigned to category option and leave all other check boxes blank.

6. In Step 2, you will need to select the category the new rule will handle. Press the category link and a pop-up will prompt you to select a category. Be sure to select only the category you assigned for DCL3 e-mails.
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7. Again in Step 2, click the specified link and a pop-up will prompt you to select the folder you would like to move the e-mails to. Be sure to select the DCL3 Emails folder. Once done, click Next.

8. The window will then ask what you want to do with the message. It should have both the stop processing more rules and move it to the specified folder options checked. Click Next.
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9. The window will then ask if there are any exceptions. You should leave all of the checkboxes here blank since you are only using the IF category to move DCL3 e-mails. Click Next.

10. Finally, you will be prompted to enter a name for this rule. Make sure to check Turn on this rule. If you already have gone through with Identity Finder and categorized DCL3 data containing e-mails, you can check the Run this rule now on messages already in “Inbox.” Now, click Finish and then OK. Remember this rule will only run when you check your e-mail in Outlook.