MICROSOFT OUTLOOK
FOR LEGAL PROFESSIONALS

Covering Microsoft 365 for Windows

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Affinity CONSULTING

ALA Association of Legal Administrators

MICROSOFT OUTLOOK

FOR LEGAL PROFESSIONALS

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Mac users: If you are using this manual with Outlook for Mac, some of the steps will be different. Further, some features available in Outlook for Windows are not available in Outlook for Mac.

The materials in this book were written using Microsoft 365 and all steps and instructions were tested prior to the publication date. As Microsoft continuously updates Microsoft 365, your software experience may vary slightly from what is seen in this manual.

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MEET OUR TEAM OF OUTLOOK EXPERTS

Meet our team of Outlook experts who have co-authored this manual.

BARRON HENLEY

Most people wouldn't relish the idea of spending a day in a conference room, teaching Microsoft Outlook. Barron is not most people. There are few things Barron enjoys more than teaching all-day software training classes.

As an attorney, he understands how challenging it is to practice law without the proper training on the technology tools. When Barron isn't training people on Word or helping transition organizations transition from WordPerfect, he focuses on automating documents and teaching CLE classes for attorneys across North America.

PAUL UNGER

While most people understand the day-to-day struggle of keeping up with email, Paul knows how to tackle the problem better than anyone. Paul's passion is coaching lawyers on managing time, distractions, tasks, emails, and documents efficiently. As the author of Tame the Digital Chaos – A Lawyer's Guide to Time, Task, Email and Distraction Management, Paul is truly an expert on the topic.

Paul's expertise is well-founded from his time practicing law. When Paul isn't coaching lawyers, he teaches CLE classes for attorneys across North America.

DANIELLE DAVISROE

Passionate about remote learning, Danielle is the force behind Affinity's membership training program, Affinity Insight. Danielle focuses on creating easily accessible training materials and webinars tailored to meet each organization's needs. From one-on-one training to organization-wide training plans, Danielle has her clients covered.

When Danielle isn't providing remote training, she focuses on teaching CLE via webinar and providing legal organizations with the advice they need to run smoothly. With a background practicing law at a boutique firm, Danielle understands the challenges that legal professionals face every day.

MICROSOFT OUTLOOK FOR LEGAL PROFESSIONALS

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CHAPTER 6
EMAIL: RULES

Can't find it? Something missing? Instructions not clear? Email manuals@affinityconsulting.com.

Rules automatically take actions when certain conditions are met. For example, rules can be used to auto-file incoming email into specific folders. Rules are very powerful and can save you a lot of time. However, because they happen automatically, you need to be careful about creating rules that make it so you may miss incoming emails.

Rule Parts

Rules have 3 parts:

- **Condition** (Optional): Use conditions to determine when to the apply the rule. If no conditions are set, the rule is applied to every incoming email. Conditions include things like emails from particular senders, with particular subjects, sent only to you, and with specific words in the email. If no conditions are set, the rule will be applied to every incoming email.
- **Actions**: The action is what happens when the condition is met. Actions include things like moving to a specified folder, categorizing the email, deleing the email, forwarding the email, and flagging the email.
- **Exceptions** (Optional): Exceptions to the conditions prevent the rule from being applied to certain emails. Exceptions include things like emails from particular senders, with particular subjects, sent only to you, and with specific words in the email.

Rules Wizard

The Rules Wizard walks you through creating simple rules based on templates.

1. On the **Home ribbon**, click on the **Rules button** and select **Manage Rules & Alerts**.
2. Click on the **New Rule** button.
3. Select the desired template and click on the **Next > button**.

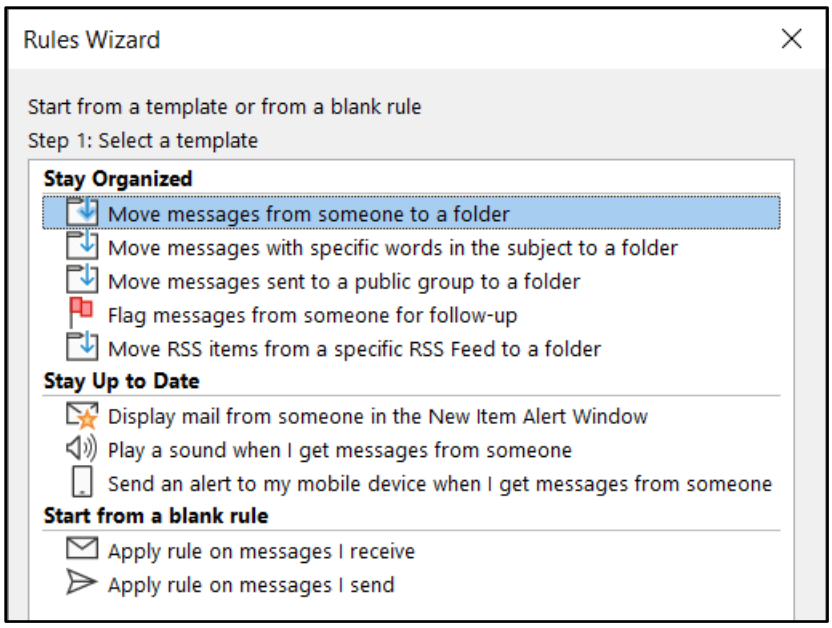

FIGURE 6-1

4. Under **Step 1**, check the boxes to add additional conditions, if any.
5. Words in blue are variables that you can change. Under **Step 2**, click on the variables to change them.

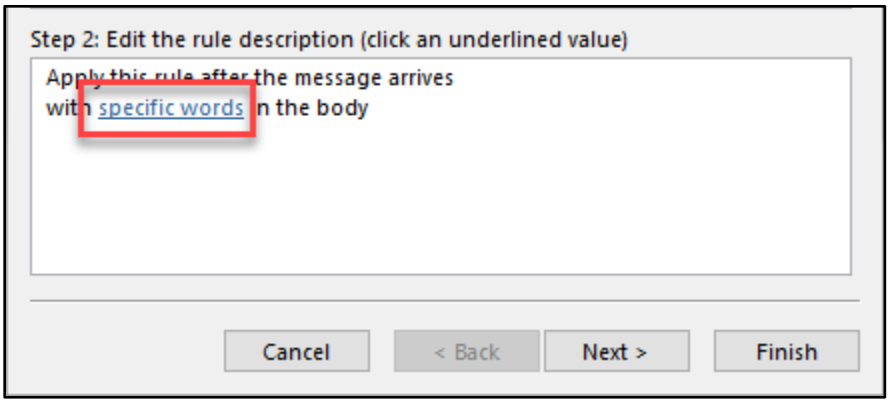

FIGURE 6-2

6. Click on the **Next > button**.
7. Under **Step 1**, check the box(es) next any additional action(s), if any.
8. Words in blue are variables that you can change. Under **Step 2**, click on the variables to change them.
9. Click on the **Next > button**.
10. Under **Step 1**, check the box(es) next the desired exception(s), if any.
11. Words in blue are variables that you can change. Under **Step 2**, click on the variables to change them.
12. Click on the **Next > button**.
13. Name the rule.

14. Optionally, to apply the rule to all emails in your inbox, under **Step 2**, check the box for **Run this rule now on messages already in "inbox."**
15. Click **Finish**.

Create Rules from Existing Emails

You can also create rules from existing emails. Doing so pre-populates many of the fields for you.

Simple Rules

The simplest rules to create use sender, subject, and/or recipient as the condition and move the email into a specified folder or create an alert as the action.

1. Find an email that meets your conditions.
2. Right-click on the email and select **Rules → Create Rule...**
3. The Create Rule dialog will pre-populate with information from the email, including the sender, the subject, and the recipients. Check the box next to the desired condition(s).
4. Check the box next the desired action(s).
5. Click **OK.**

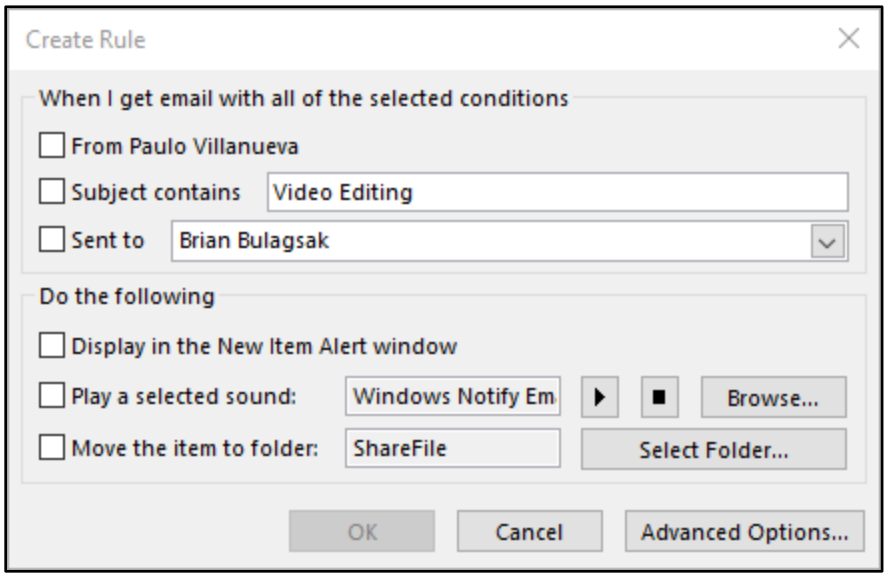

FIGURE 6-3

More Complex Rules

You can create more complex rules from existing emails, you just need to use the advanced options.

1. Find an email that meets your conditions.
2. Right-click on the email and select **Rules → Create Rule...**
3. Click on the **Advanced Options... button**.
4. Under **Step 1**, check the box(es) next the desired condition(s).

5. Words in blue are variables that you can change. Some of these variables will be pre-populated from the email you selected. Under **Step 2**, click on the variables to change them.

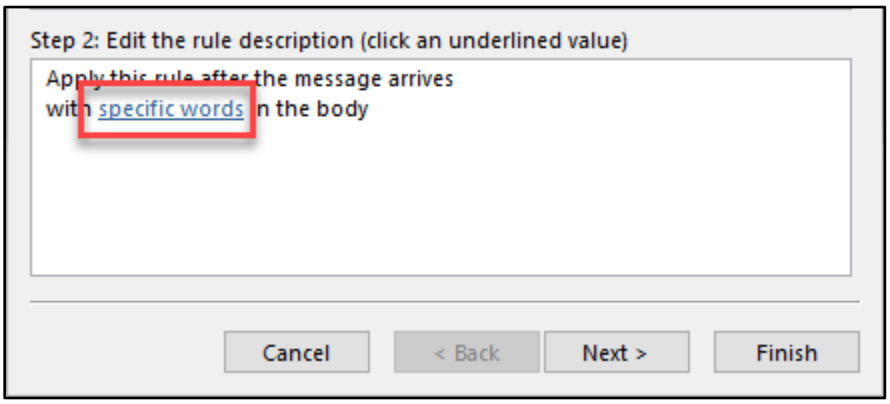

FIGURE 6-4

6. Click on the **Next > button**.
7. Under **Step 1**, check the box(es) next the desired action(s).
8. Words in blue are variables that you can change. Some of these variables will be pre-populated from the email you selected. Under **Step 2**, click on the variables to change them.
9. Click on the **Next > button**.
10. Under **Step 1**, check the box(es) next the desired exception(s), if any.
11. Words in blue are variables that you can change. Some of these variables will be pre-populated from the email you selected. Under **Step 2**, click on the variables to change them.
12. Click on the **Next > button**.
13. Name the rule.
14. Optionally, to apply the rule to all emails in your inbox, under **Step 2**, check the box for **Run this rule now on messages already in "inbox."**
15. Click **Finish**.

Example Rules

Delay Send Email by One Minute

Instructions to set up a rule to delay sending mail by one minute (in case you change your mind):

1. On the **Home ribbon**, click on the **Rules button** and select **Manage Rules & Alerts**.
2. Click the **New Rule** button.
3. Select **Apply rule on messages I send** and click **Next**.

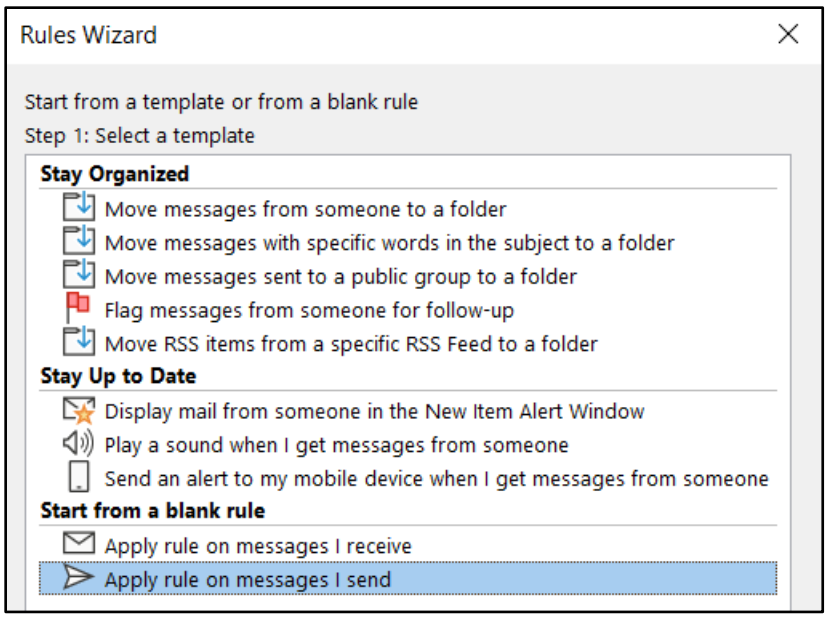

FIGURE 6-5

4. On the next screen ("which conditions do you want to check"), don't check anything (you want this rule to apply to every email you send) and click the **Next** button at the bottom. You'll see the following dialog (click **Yes**):

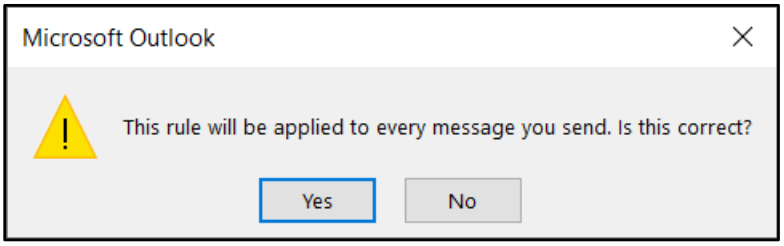

FIGURE 6-6

5. In the next screen, check **defer delivery by a number of minutes**, and then click the hyperlink for **a number of** at the bottom of the screen and enter the number of minutes you want to delay your email. Click **OK**.

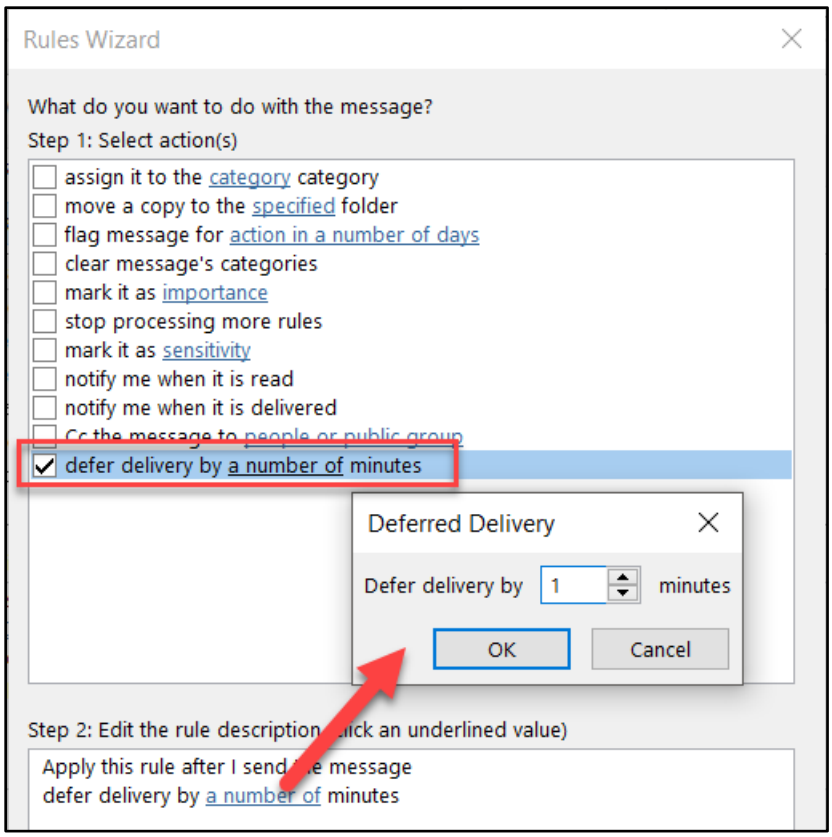

FIGURE 6-7

6. Click **Next** and add any exceptions (for people you don't want to delay email to).
7. Click **Next**, name your rule "Delay" (or anything else you want to name it) and click **Finish**.

Keep Track of Delegated Email

Many people forward email to others to deal with but have a difficult time remembering what they delegated for follow up purposes. Here's a rule that will help.

1. On the **Home ribbon**, click on the **Rules button** and select **Manage Rules & Alerts**.
2. Click the **New Rule** button.
3. Select **Apply rule on messages I receive** and click **Next**.

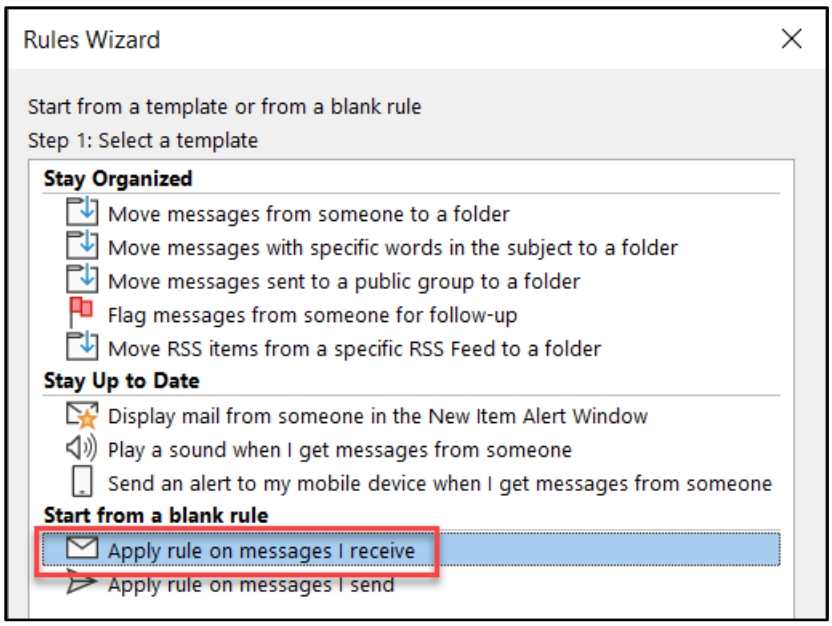

FIGURE 6-8

4. Under "Which conditions do you want to check?," check BOTH **from people or public group** and **where my name is in the CC box**. At the bottom of the dialog, click the hyperlink for **people or public group** and add your email address. We're basically creating a rule that will look for emails from you and copied to you. Click **Next**.

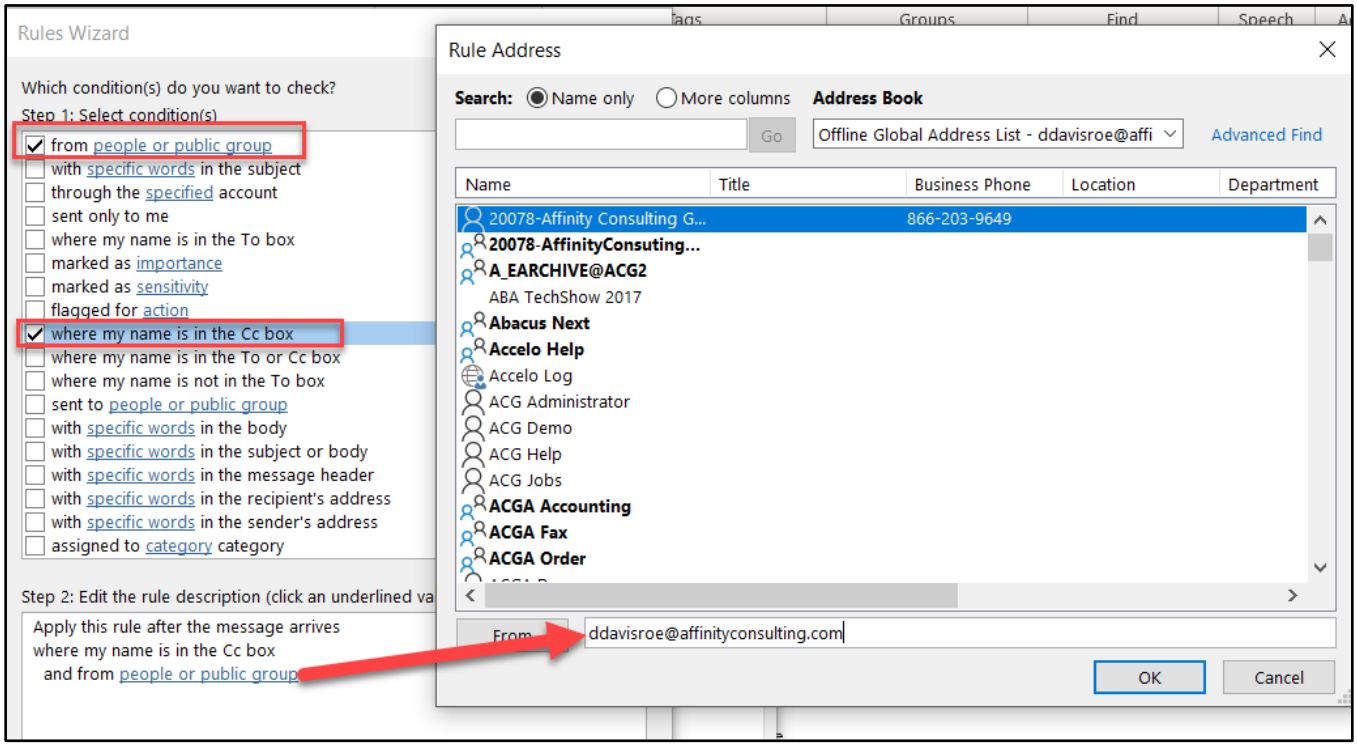

FIGURE 6-9

5. Under "What do you want to do with the message?" choose **move it to the specified folder**. Make the specified folder your Delegated Mail folder. Click **Next** and add any exceptions. Click **Next**, name it and click **Finish**.

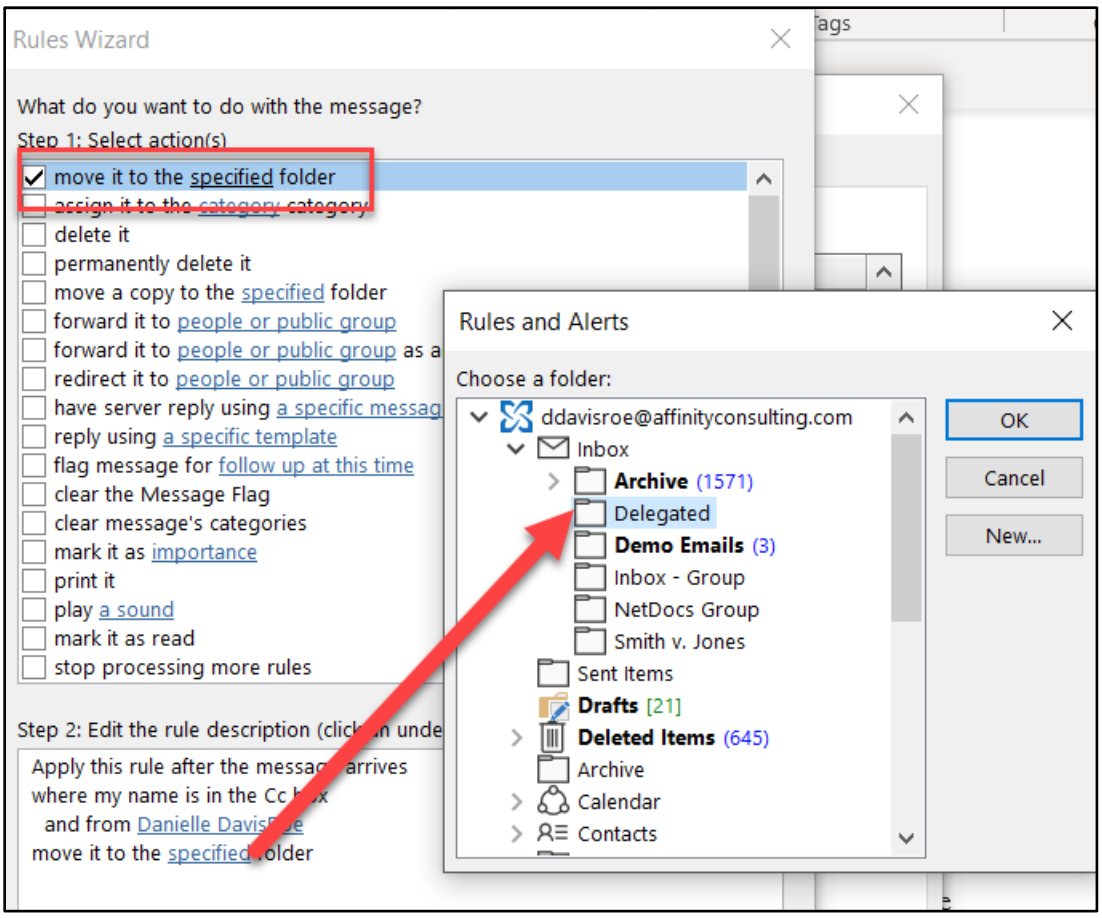

FIGURE 6-10

Manage Rules

Turning Off Rules

Turn rules off by un-checking them in the Rules and Alerts dialog.

1. On the **Home ribbon**, click on the **Rules button** and select **Manage Rules & Alerts**.
2. Uncheck the boxes next to any rules you want to turn off.

Reordering Rules

Rules are processed in the order in which they are listed in the Rules and Alerts dialog. The order may make a difference if more than one rule applies to an incoming email.

1. On the **Home ribbon**, click on the **Rules button** and select **Manage Rules & Alerts**.
2. Use the up and down arrows to reorder the rules.

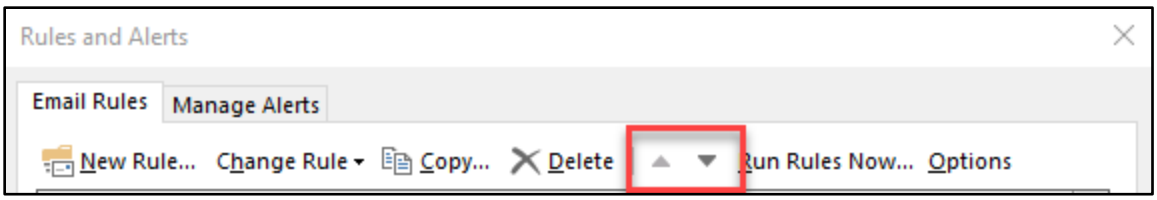

FIGURE 6-11

Stop Processing Rules

Sometimes, when a condition is met and a rule is applied, you want to stop processing other rules. Stop processing rules is an action that can be added to any rule. See below for instructions on how to edit any existing rules.

Editing Existing Rules

You can edit any existing rules through the Rules and Alerts dialog.

1. On the **Home ribbon**, click on the **Rules button** and select **Manage Rules & Alerts**.
2. Click on **Change Rule**.
3. Select **Edit Rule Settings...**

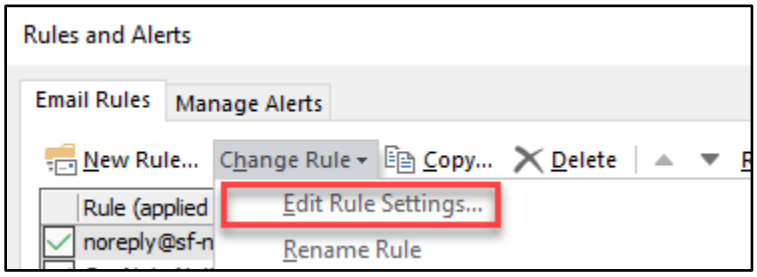

FIGURE 6-12

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