Rules are tools that people can use to automatically sort, flag, categorize or filter email messages. This guide will show you how you can create rule templates that can be applied to messages. If turned on, rules will be applied to all incoming messages – actions will be performed if a message meets specific criteria. You can customize rules to do almost anything you want – this guide will only provide a basic layout on how to create your own rules – it won’t provide an exhaustive list of examples.

Creating & Managing Rules

1. Visit https://mail.utoronto.ca and login using your UTORid credentials.

2. From your Inbox, click on the Gear icon at the top right and type in “rules” in the search bar. Click on the option Inbox Rules that appears.

3. The window that appears will be a listing of current Inbox rules that are applied to your O365 account. If you have not created any rules yet, the list will be empty (see below). Click on the + icon to create a new rule.
4. The next dialog window will show a list of **Conditions** and **Actions**.

**Conditions** is a set of criteria that an email will have to meet. They can range from a variety of different criteria:
- From specific people or groups
- Sent to specific people (including yourself)
- Marked with a level of importance (e.g. urgent)
- Marked with a level of sensitivity (e.g. confidential)
- Based on specific words (keywords) in the body, subject or message headers
- Received within a date range
- Messages that have attachments
- And more!

To add a Condition to your rule, select the appropriate option. If you wish to add a second Condition, click on the **Add Condition** button.

**Actions** is a set of actions you wish Outlook to perform if a message meets the **Conditions** you specified above. They can range from a variety of options:
- Move, copy or delete the email item
- Pin the message
- Mark the message (as important, as a category, as read, as junk)
- Forward, redirect or send the message

To add an Action to your rule, select the appropriate option. If you wish to add a second Action click on the **Add Action** button.
At the bottom of the window, you can specify **Exceptions**. The list of available exceptions should be similar to the list of Conditions. To specify an Exception, click on the **Add Exception** button and select the appropriate condition.

When setup, the rule will behave in a specific manner: all incoming new mail messages that meet the **Conditions** you specified, will have the **Action** applied to them, unless they meet the **Exceptions** that you have specified.

As an illustrative example, the rule below (called Test Rule) has been setup to filter mail messages marked as *private* to be moved into a folder called *Personal*, except if the mail message contains an attachment. If active, all incoming mail messages will have this rule applied if they meet the conditions specified.

![New inbox rule window](image)

5. Lastly, from the Inbox Rules window (in Step 3), you can also rank your rules by selecting a specific rule and clicking the up and down arrows. Rules will be processed in order of their ranking on this list. For example, if an incoming message will be flagged by multiple rules, it will have the actions applied to it from the top-most rule listed in the **Rules & Alerts** window.

Keep this in mind if you find a rule is not behaving as expected.