Creating Rules in Office 365

As the volume of incoming email messages increases, it can be helpful to use Office 365 to automatically process them. Messages can be filed into folders, marked as important, and even redirected as they arrive, based on criteria you specify. These processing features, called filters in some email programs, are called Rules in Office 365.

For assistance with this procedure, Faculty and Staff should contact the IT Service center at 508-999-8790 or email itscenter@umassd.edu, and Students should contact the student Help Desk at 508-999-8884, email itstudentcenter@umassd.edu, or visit the Library first floor Help Desk.
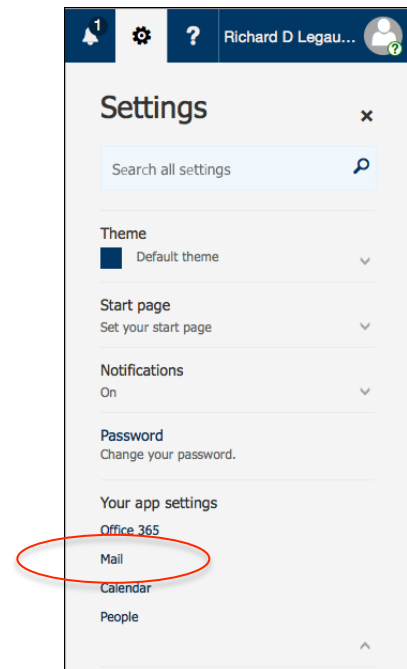
1. Open a web browser, and log into the myUMassD portal at https://my.umassd.edu.

2. From the Quicklaunch menu, select **Office 365**, then log in again if necessary.

3. The Office 365 Home window is displayed, as shown here.

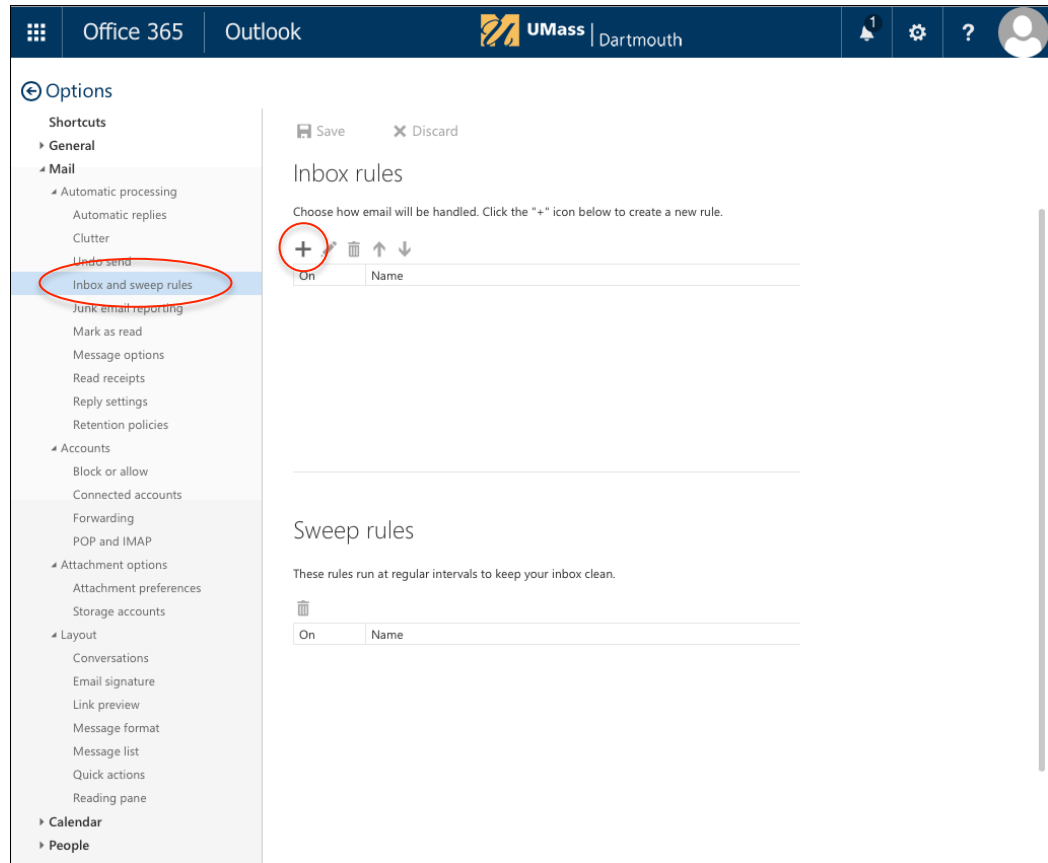Click the **Settings** button in the upper right corner.

4. The settings pane opens on the right.

Click the **Mail** link.

A list of mail Options is displayed in the left column.

5. Click to select **Inbox and sweep rules**.

   The Inbox rules options are displayed.

6. Click the plus (+) button to add a new rule.

7. The New inbox rule page is displayed.

Enter a **Name** for the rule into he field provided. Rule names must be unique.

8. Select a condition from the first **Select one** pop-up menu. The condition is used to determine if the selected rule will be applied to an incoming message.

Many different condition options are available. They appear in a series of submenus, as explained here.

Use the **It was sent or received** options to test if the message was **Received from** a particular email address, or **Sent to** a particular address.
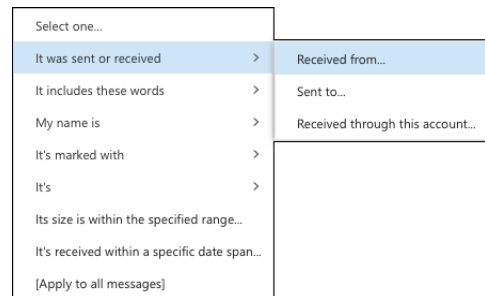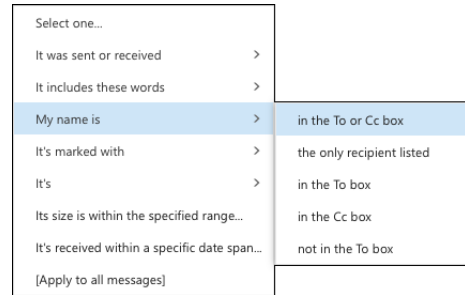

Use the **It includes these words** options to test if the message contains specified text in different parts of the message.
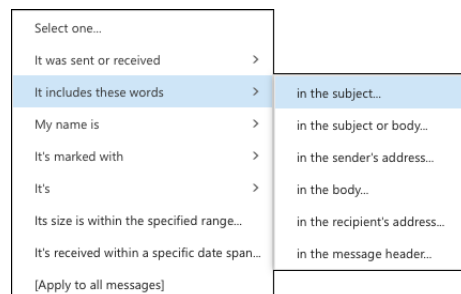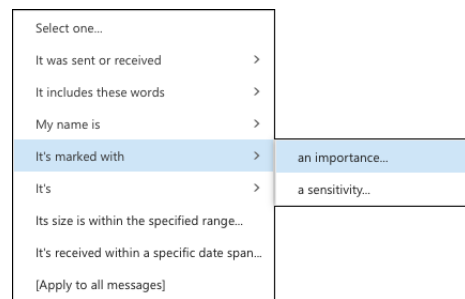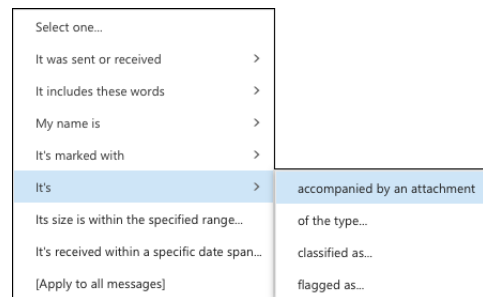
Use the **My name is** options to test where your email address appears in the message header.

Use the **It's marked with** options to test if the message is marked with a particular importance or sensitivity.


Use the **It's** options to test if the message has an attachment, or is of a particular message type, such as an invitation or event response.

There are also options at the bottom of the menu to check the message size and arrival date.

9. When a condition is selected, a dialog box or selection page is usually displayed. In this example, **It includes these words > in the sender's address…** was selected as the condition, and the Specify words or phrases dialog box is displayed.
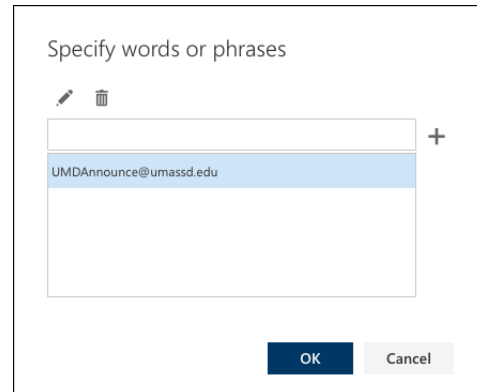
   Enter the desired text into the field provided, then click the plus (+) button to the right of the field.
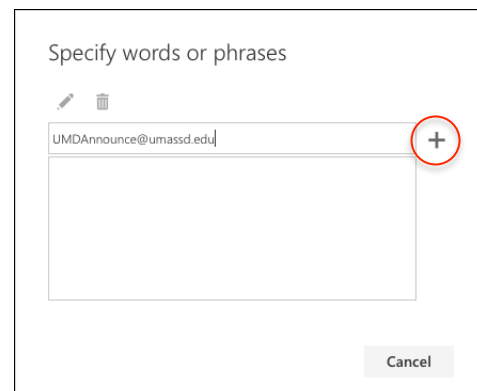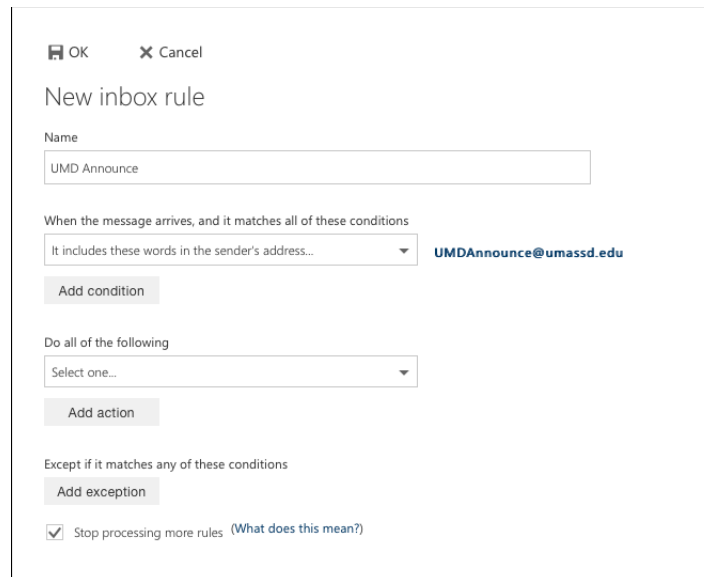
10. The text appears in the list box below the field. Multiple word or phrases can be added. If there are multiple items in the list, the message must match all them for the rule to be applied.

    Click the **OK** button to continue.

11. The specified condition is shown on the New inbox rule page.

    To add an additional condition, click the **Add condition** button. A new Select one pop-up menu is added below the last condition. You can add many conditions to each rule if needed.

    Remember that the Rule is only applied to incoming messages that match *all* of the conditions you specify.

12. Select an action from the **Select one** pop-up menu that appears below Do all of the following. The action is performed on all new incoming messages that match the conditions you specify.
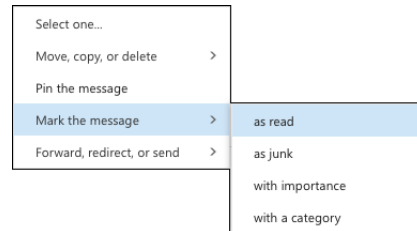
    Many different action options are available. They appear in a series of submenus, as explained here.

Use the **Move, copy, or delete** options to move the message to a different folder, copy it to a different folder, or delete it.
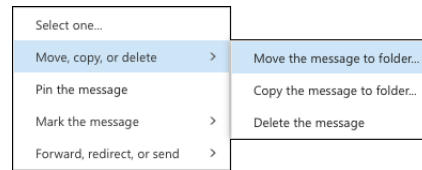
Use the **Mark the message** options to mark the message as read, junk mail, or apply an importance or category tag.

Use the **Forward, redirect, or send** options to automatically forward or redirect the message to someone else.

An option is also available to **Pin the Message** to the top of the message list.

13. When an action is selected, a dialog box or selection page is often displayed. In this example, **Move, copy, or delete > Move the message to folder…** was selected as the action, and the Select folder dialog box is displayed.

    Click to select the desired folder, then click the **OK** button.

    Note that you cannot create new folders in this dialog box. The folder you want to use must already exist.
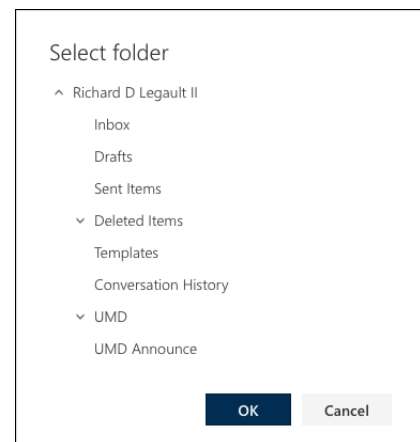
14. The specified action is shown on the New inbox rule page.

To add an additional action, click the **Add action** button. A new Select one pop-up menu is added below the last action. You can add many actions to each rule if needed.

15. You can also add exceptions to a rule. These are additional conditions that prevent the rule from being applied to a message. For example, you might file messages into a folder automatically, unless they are marked as important.

To do this, click the **Add exception** button. A Select one pop-up menu is displayed. These work the same as the conditions options described is steps 8-10.

At the bottom, a checkbox indicates that Office 365 will **Stop processing more rules** if this rule is applied. This causes other rules to be ignored when the message matches this rule's conditions.

16. When your conditions, actions and exceptions are complete, click the **OK** button at the top. The Rule is saved and added to the rules list.
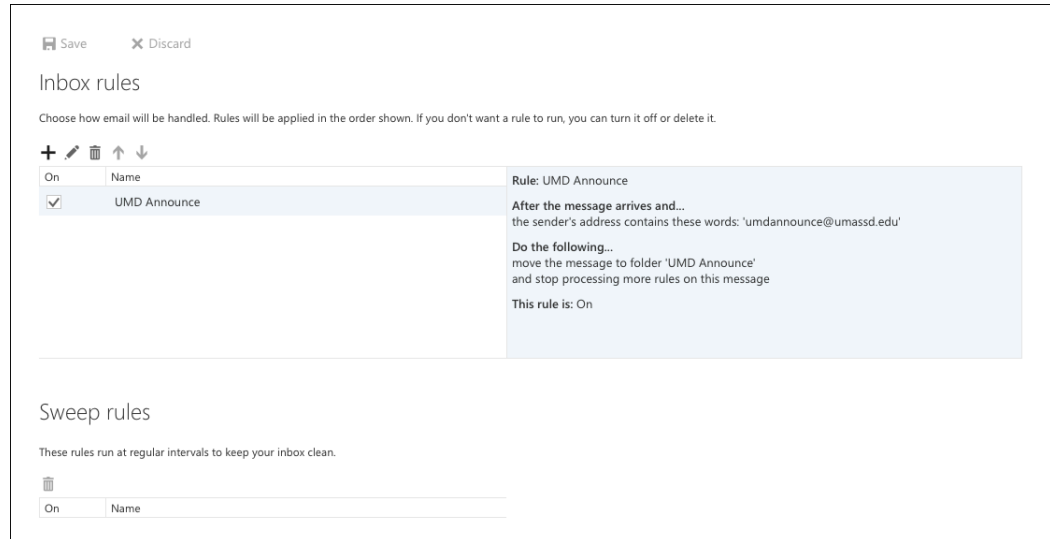
In the rules list, click the name of a rule to select it. An explanation of the rule appears to the right.

Click the pencil button to edit the selected rule.

Click the trash button to delete the selected rule.

When you have created more than one rule, Office 365 tests them on each incoming message in order, starting with the rule at the top of the list. For efficiency, it is best to put the rules that are most likely to apply first.

Use the arrow buttons above the name column to move the selected rule up or down in the list.

Click the **Save** button at the top to save any changes.

Important: Office 365 only tests new, unread messages that arrive in your Inbox. When you read a message with an email client (such as Android's GMail App or iOS Mail) on your mobile device, and it is marked as read, it will not be filtered using the Rules.