How to Create Outlook Rules to filter your notification Emails

If you only need to direct all of your notifications to a particular folder, setting up the rule is very simple.

1. In outlook, on the “home” tab, click the “Rules” button and choose “Manage Rules and Alerts”
2. On the “E-mail Rules” Tab click “New Rule…”
3. In the “Step 1” box under “Stay Organized” section select the template “Move messages with specific words in the subject to a folder”
4. In the “Step 2” box click on “specific words”
5. In the dialog that comes up enter “Volunteer Impact System Notification” and click “Add”. Then Click “Ok”
6. In the “Step 2” box click on “Specified” to select the folder to move the emails to
7. In the dialog that comes up browse to the folder you want these notifications to be moved to then Click OK.
   a. If you haven't created the folder to move them to yet, you can click “New…” and follow the prompts to create a new folder
8. Click “Next” and then click “Next” again until you get to the step “Finish rule setup”.
9. On the “Finish rule setup” step you can enter a name for the rule and choose to run it on your existing mail in your mail box (I would recommend doing this so that your old notifications also get sorted).
10. Click Finish!

If you want to direct each of the three types of notifications to different folders you can make a rule per type and change the text in step 6 to include more of the subject (Volunteer Declined Assignment, Volunteer has changed their availability, or Volunteer has changed their status) and then direct each one to its own folder.

To direct availability change notifications and/or activity assignment notifications for a particular activity or category to a folder:

Sometimes you need to pay special attention to notifications for a particular activity or category of activities. You can do this by creating a rule from a blank template.

Note: If you have already setup a rule based on the subject, but you want to further filter these types of emails you will need to edit the existing rule and uncheck the “Stop processing more rules” checkbox.

1. In outlook, on the “home” tab, click the “Rules” button and choose “Manage Rules and Alerts”
2. On the “E-mail Rules” Tab click “New Rule…”
3. Select “Apply rule on Messages I receive” found under the “Start from a blank rule” heading. Click Next.
4. In the “step 1: Select condition(s)” section check “with specific words in the subject” and “with specific words in the body”
5. In the “Step 2: Edit the rule description” box click the first “specific words” (in the subject)
   a. Type “Volunteer Impact System Notification” into the box
   b. Click Add and then Click OK
6. In the “Step 2: Edit the rule description’ box click the second “specific words” (in the body)
   a. Type the name of the activity or category you wish to filter into the box.
   b. Click Add and then click OK.
7. Click Next
8. Check “Move it to the specified folder”, then in the step 2 section click “specified” (folder).
   a. Optionally you may want to also check “flag message for follow up at this time”
   b. Optionally you may want to also check “mark it as importance”
   c. Optionally you can even have outlook show a new item alert message or a desktop alert
9. Select the folder you want to put these notifications, or click “New..” and follow the prompts to make a new folder for them. Click OK.
   a. If you chose to flag message for follow up at this time click “follow up at this time”, select a time in the “For” drop down, and click “OK”
   b. If you chose to mark it as importance, click “Importance” in the step 2 box and then select the importance level and click OK
   c. If you chose to check any other options, there may be other blue text in the step 2 box to configure. Click on the text and set any options it presents.
10. Click Next
11. Enter a name for your new rule and optionally check “Run this rule on messages already in “Inbox”
12. Click “Finish”
13. Click “OK” to close the Rules and Alerts Box.