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## Create Outlook Rules to Funnel CRM Comments

Every time a comment is logged on a case, you will receive an email notification. In larger units, this isn't particularly helpful. Setup the following Outlook rule so your person inbox isn't flooded with these emails.

In Outlook, click Rules in the Move section of the ribbon then Manage Rules & Alerts.



Click New Rule ...

Rules and Alerts	×
Email Rules Manage Alerts	
Apply changes to this folder: Inbox [schavez2@iu.edu]	~
<mark>≣ New Rule… C</mark> hange Rule ▾  Copy… 🗙 <u>D</u> elete   ▲ 💌 <u>R</u> un Rules Now…	. <u>O</u> ptions
Rule (applied in the order shown) Actions	~
✓ sent only to me	
🖂 IU list system 🔁	ů8
support@sciquest.com	ïł –
🗹 'buyiutesting-l@iu.edu' 🔁	Ÿ <del>Ÿ</del>
🔽 'buyiutesting-l@list.iu.edu'	ïł
Rule description (click an underlined value to edit):	~
Apply this rule after the message arrives	
sent only to me	
and from support@sciquest.com	
and with Folder: Org: in the body	
move it to the <u>support@sciquest</u> roider	
Enable rules on all messages downloaded from RSS Feeds	
OK Can	cel Apply



On the next screen, make sure **Move messages from someone to a folder** is highlighted (it should be by default) and click **Next**.

Rules Wizard	×	
Start from a template or from a blank rule Step 1: Select a template		
Stay Organized		
Move messages from someone to a folder		
Move messages with specific words in the subject to a folder		
Wove messages sent to a public group to a folder		
Flag messages from someone for follow-up		
Wove RSS items from a specific RSS Feed to a folder		
Stay Up to Date		
🙀 Display mail from someone in the New Item Alert Window		
이) Play a sound when I get messages from someone		
. Send an alert to my mobile device when I get messages from someone		
Start from a blank rule		
Apply rule on messages I receive		
Apply rule on messages I send		
Step 2: Edit the rule description (click an underlined va	_	
Apply this rule after the message arrives		
from people or public group		
move it to the <u>specified</u> folder		
Example: Move mail from my manager to my High nce folder		
Cancel < Back Next > Finish		



On the next screen, make sure **from people or public group** is highlighted (it should be by default), then click **people or public group** in the Step 2 box.

Which condition(s) do you want to check? Step 1: Select condition(s)
Step 1: Select condition(s)         ✓ from people or public group         with specific words in the subject         through the specified account         sent only to me         where my name is in the To box         marked as importance         marked as sensitivity         flagged for action         where my name is in the Cc box         where my name is in the To or Cc box         where my name is not in the To box         sent to people or public group         with specific words in the body
<ul> <li>✓ from people or public group</li> <li>✓ with specific words in the subject</li> <li>through the specified account</li> <li>sent only to me</li> <li>where my name is in the To box</li> <li>marked as importance</li> <li>marked as sensitivity</li> <li>flagged for action</li> <li>where my name is in the Cc box</li> <li>where my name is in the To or Cc box</li> <li>where my name is not in the To box</li> <li>sent to people or public group</li> <li>with specific words in the body</li> </ul>
<pre>with specific words in the subject through the specified account sent only to me where my name is in the To box marked as <u>importance</u> marked as <u>sensitivity</u> flagged for <u>action</u> where my name is in the Cc box where my name is in the To or Cc box where my name is not in the To box sent to <u>people or public group</u> with <u>specific words</u> in the body</pre>
<pre>http://timespecified account sent only to me where my name is in the To box marked as <u>importance</u> marked as <u>sensitivity</u> flagged for <u>action</u> where my name is in the Cc box where my name is in the To or Cc box where my name is not in the To box sent to <u>people or public group</u> with <u>specific words</u> in the body</pre>
<ul> <li>sent only to me</li> <li>where my name is in the To box</li> <li>marked as <u>importance</u></li> <li>marked as <u>sensitivity</u></li> <li>flagged for <u>action</u></li> <li>where my name is in the Cc box</li> <li>where my name is in the To or Cc box</li> <li>where my name is not in the To box</li> <li>sent to <u>people or public group</u></li> <li>with <u>specific words</u> in the body</li> </ul>
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<ul> <li>flagged for action</li> <li>where my name is in the Cc box</li> <li>where my name is in the To or Cc box</li> <li>where my name is not in the To box</li> <li>sent to people or public group</li> <li>with specific words in the body</li> </ul>
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<ul> <li>where my name is in the To or Cc box</li> <li>where my name is not in the To box</li> <li>sent to people or public group</li> <li>with specific words in the body</li> </ul>
<ul> <li>where my name is not in the To box</li> <li>sent to people or public group</li> <li>with specific words in the body</li> </ul>
with <u>specific words</u> in the body
with <u>specific words</u> in the body
with specific words in the subject or body
with specific words in the message header
with specific words in the recipient's address
with <u>specific words</u> in the sender's address
assigned to <u>category</u> category
Step 2: Edit the rule description (click an underlined value)
Apply this rule after the message arrive
from people or public group
move it to the <u>specified</u> folder
and stop processing more rules
Cancel < Back Next > Finish

A new window opens. Enter <u>noreply@salesforce.com</u> in the **From** field and click **OK**.

Rule Address					×
Search:  Name only OMore co	lumns Address Bool	ĸ			
	Go Offline Glob	al Address List - schavez2@iu	e 🗸 🛛 Advanced	Find	
Name	Title	Business Phone	Location	Department	Email Address
2 <sup>A</sup> !to-be-removed					!to-be-removed@ex
- "Faculty Media Production Spac					bl-uits-wright-2261
- "Faculty Media Production Spac					in-uits-ul-0135@res
🗄 "Faculty Media Production Spac					bl-uits-wells-e251@
🗄 "IUB UITS Classroom Technician					IUB-CCTS-TECHGRO
"James Test Room B"					James-Test-RoomB@
"James Test Room"					James-Test-Room@i
Recording Booth – Wells E242*					bl-uits-wells-e242@
#POP Forum - Protect Our Patie					POPForum-ProtectO
CA436) Social Science Computer.					IN-LART-SSCC-CA43
오 (Chism) Schmidt, Lauren P	Staff	(317) 274-3759	CA 417A	IU SCHOOL OF L	lchism@iu.edu
Q (ES)2 research program	group				s2iuweb@iupui.ed
Q (FKK) Senior English Lecturer	group				88584@iupui.edu
Q (MCB) English Senior Lecturer	group				84747@iupui.edu
🔉 -, Rohith Venkata Reddy	Graduate				hi@iu.edu
•					3@indiana.onmic
Q., Aayush	Graduate				y@iu.edu
鵍 ., Anjali Sreedhar	Alumni				jalis@indiana.edu
鵍 ., Aslan	Graduate				ta@indiana.e
Q., Benjamin	Faculty	(812) 855-5665	HH 2100	KELLEY SCHOO	itzb@indiana.e 🗡
S					· · · ·
From noreply@salesforce	.com				
					DK Cancel

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pply this rule a	fter the messag	e arrives		
ove it to the <u>sr</u> and stop proce	<u>becified</u> folder essing more rule	es		
ample: Move	mail from my n	nanager to my H	igh Importance	folder
-	-			

In the new window click **New** to create a new folder in your Inbox.



In the Name field enter "Case Comments" then click OK.

Create New Folder	×
Name:	
Case Comments	
Folder contains:	
Mail and Post Items	$\sim$
Select where to place the folder:	
<ul> <li>✓ Schavez2@iu.edu         <ul> <li>Archive</li> <li>✓ Inbox (2)</li> <li>✓ Drafts</li> <li>✓ Deleted Items (2565</li> <li>✓ Calendar</li> <li>× E Contacts</li> <li>✓ Conversation His</li> <li>✓ Junk Email [19]</li> <li>✓ Sent Items</li> </ul> </li> </ul>	~
OK Cano	el

**Create Outlook Rules** 

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Continue clicking **OK** until you're back at the Rules Wizard window, then click **Finish**.

Start from a template or from a blank rule   Stay Organized   Image: Move messages from someone to a folder   Image: Move messages with specific words in the subject to a folder   Image: Move messages sent to a public group to a folder   Image: Move messages from someone for follow-up   Image: Move RSS items from a specific RSS Feed to a folder   Start from a blank rule   Image: Display mail from someone in the New Item Alert Window   Image: Play a sound when I get messages from someone   Image: Display mail from someone in the New Item Alert Window   Image: Play a sound when I get messages from someone   Image: Display mail from someone in the New Item Alert Window   Image: Play a sound when I get messages from someone   Image: Display mail from someone in the New Item Alert Window   Image: Play a sound when I get messages from someone   Image: Display mail from someone in the New Item Alert Window   Image: Play a sound when I get messages from someone   Image: Display mail from someone in the New Item Alert Window   Image: Play a sound when I get messages from someone   Image: Display mail from someone in the New Item Alert Window   Image: Play a sound when I get messages from someone   Image: Display mail from my manager to my High Importance fold   Image: Play Play Play Play alert Item message from my High Importance fold	Rules Wizard	×		
Stay Organized         Move messages from someone to a folder         Move messages with specific words in the subject to a folder         Move messages from someone for follow-up         Move RSS items from a specific RSS Feed to a folder         Stay Up to Date         Display mail from someone in the New Item Alert Window         Play a sound when I get messages from someone         Send an alert to my mobile device when I get messages from someone         Start from a blank rule         Apply rule on messages I receive         Apply rule on messages I send         Step 2: Edit the rule description (click an underlined value)         Apply this rule after the message arrives from noreply@salesforce.com         move it to the <u>Case Comments</u> folder and stop processing more rules         Example: Move mail from my manager to my High Importance fold         Cancel       < Back	Start from a template or from a blank rule Step 1: Select a template			
Image: Start Provide the start of the	Stay Organized			
<ul> <li>Move messages with specific words in the subject to a folder</li> <li>Move messages sent to a public group to a folder</li> <li>Flag messages from someone for follow-up</li> <li>Move RSS items from a specific RSS Feed to a folder</li> <li>Stay Up to Date</li> <li>Display mail from someone in the New Item Alert Window</li> <li>Play a sound when I get messages from someone</li> <li>Send an alert to my mobile device when I get messages from someone</li> <li>Send an alert to my mobile device when I get messages from someone</li> <li>Send an alert to my mobile device when I get messages from someone</li> <li>Send an alert to my mobile device when I get messages from someone</li> <li>Send an alert to my mobile device when I get messages from someone</li> <li>Start from a blank rule</li> <li>Apply rule on messages I receive</li> <li>Apply rule on messages I send</li> </ul> Step 2: Edit the rule description (click an underlined value) Apply this rule after the message arrives from noreply@salesforce.com move it to the <u>Case Comments</u> folder <ul> <li>and stop processing more rules</li> </ul> Example: Move mail from my manager to my High Importance fold Cancel <ul> <li>Back</li> </ul>	Move messages from someone to a folder			
Move messages sent to a public group to a folder         Flag messages from someone for follow-up         Move RSS items from a specific RSS Feed to a folder         Stay Up to Date         Display mail from someone in the New Item Alert Window         Image: Play a sound when I get messages from someone         Image: Send an alert to my mobile device when I get messages from someone         Send an alert to my mobile device when I get messages from someone         Start from a blank rule         Image: Apply rule on messages I receive         Image: Apply rule on messages I send         Step 2: Edit the rule description (click an underlined value)         Apply this rule after the message arrives from noreply@salesforce.com         move it to the Case Comments folder and stop processing more rules         Example: Move mail from my manager to my High Importance fold         Cancel       < Back	Move messages with specific words in the subject to a folder			
Flag messages from someone for follow-up         Move RSS items from a specific RSS Feed to a folder         Stay Up to Date         Display mail from someone in the New Item Alert Window         (1)         Play a sound when I get messages from someone	Move messages sent to a public group to a folder			
Move RSS items from a specific RSS Feed to a folder         Stay Up to Date         Send an alert to my mobile device when I get messages from someone	Flag messages from someone for follow-up			
Stay Up to Date         Image: Display mail from someone in the New Item Alert Window         Image: Display mail from someone in the New Item Alert Window         Image: Display mail from someone in the New Item Alert Window         Image: Display mail from someone in the New Item Alert Window         Image: Display mail from someone in the New Item Alert Window         Image: Display mail from someone in the New Item Alert Window         Image: Display mail from a blank rule         Image: Display mail from a blank rule         Image: Display mail from messages I receive         Image: Display mail from messages I receive         Image: Display mail from messages I receive         Image: Display mail from messages I send         Step 2: Edit the rule description (click an underlined value)         Apply this rule after the message arrives         from noreply@salesforce.com         move it to the Case Comments folder         and stop processing more rules         Example: Move mail from my manager to my High Importance fold         Cancel       < Back	Move RSS items from a specific RSS Feed to a folder			
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<ul> <li>(1)) Play a sound when I get messages from someone     <li>Send an alert to my mobile device when I get messages from someone</li> <li>Start from a blank rule</li> <li>Apply rule on messages I receive</li> <li>Apply rule on messages I send</li> </li></ul> Step 2: Edit the rule description (click an underlined value) Apply this rule after the message arrives from noreply@salesforce.com move it to the <u>Case Comments</u> folder <ul> <li>and stop processing more rules</li> </ul> Example: Move mail from my manager to my High Importance fold Cancel < Back Next > Finish	Display mail from someone in the New Item Alert Window			
	지까 Play a sound when I get messages from someone			
Start from a blank fule	Send an alert to my mobile device when I get messages from someone Statt from a black rule			
Apply rule on messages Freceive		-		
Step 2: Edit the rule description (click an underlined value)         Apply this rule after the message arrives         from noreply@salesforce.com         move it to the Case Comments folder         and stop processing more rules         Example: Move mail from my manager to my High Importance fold         Cancel       < Back	Apply rule on messages I receive			
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move it to the <u>Case Comments</u> folder and stop processing more rules         Example: Move mail from my manager to my High Importance fold         Cancel       < Back	from norenly@salesforce.com			
and stop processing more rules Example: Move mail from my manager to my High Importance fold Cancel < Back Next > Finish	move it to the Case Comments folder			
Example: Move mail from my manager to my High Importance fold         Cancel       < Back	and stop processing more rules	_		
Example: Move mail from my manager to my High Importance fold       Cancel       < Back				
Cancel < Back Next > Finish	Example: Move mail from my manager to my High Importance fold			
Cancel < Back Next > Finish				
Cancel < Back Next > Finish				
	Cancel < Back Next > Finish			

In the Rules and Alerts window click **Apply**.

Rules and Alerts		×
Email Rules Manage Alerts		
Apply changes to this folder: Inbox [schavez2@iu.edu]		$\sim$
📻 New Rule Change Rule 🗸 🖹 Copy 🗙 Delete 🛛 🔺	• Run Rules Now Options	
Rule (applied in the order shown)	Actions	~
noreply@salesforce.com	E4	Ϋ́₽
sent only to me	FJ	00
IU list system		Υ <u></u>
support@sciquest.com		ΫÅ
buyiutesting-l@iu.edu'		ΫÅ
buyiutesting-l@list.iu.edu'		Š.
Rule description (click an underlined value to edit):		
Apply this rule after the message arrives		
from noreply@salesforce.com		
move it to the <u>Case Comments</u> folder		
and stop processing more rules		
	_	
Enable rules on all messages downloaded from RSS Feeds		
	OK Cancel	Apply

All new emails from that sender will be automatically funneled into the folder you specified.