

Storyboard for Creating Rules in Outlook

Business Purpose: The purpose of this training is to show Microsoft support agents how to assist customers in using rules in an Outlook inbox. This course will be part of the overall Outlook training.

The benefits for using rules in Outlook will allow users to move, flag and respond to email messages automatically.

Business Goal: Microsoft support agents will be able to increase customer assistance by explaining how to use rules in Outlook to organize emails.

Target Audience: New support agents and tenured support agents

Training Time: 15 minutes

Intended Outcomes (Major Objectives):

After completing this module, the learner will be able to...

- Define reasons to use rules.
- Identify steps for creating a new rule.
- Apply a new rule.

Notes for Reviewer: Please use Notes column for feedback and questions. All comments will be resolved before programming can begin.

Questions for reviewers are indicated with **green highlighting**. All questions will need to be resolved before programming can begin.

Color Theme:



Section & Title	Visual & Display	Block Style & Interaction	Notes
<p>Title Page/Course Overview</p>	<p>Picture - Computer</p> <p>Rules are Important!</p> <p>Are your customers calling frustration when they are missing important emails? Are they struggling to stay digitally organized?</p> <p>In this module, we will be focusing on helping to assist your customers with using the rules feature in Outlook.</p> <p>Click on the Let's Get Organized" button when you are ready to begin.</p>	<p>Tab – Let's Get Organized</p>	
Section & Title	Visual & Display	Block Style & Interaction	Notes
<p>Introduction</p>	<p>Before we begin, let's watch this short video!</p> <p>Insert Video</p> <p>We want you to be familiar with how to use the rules feature in Outlook.</p> <p>So, after completing this course, you'll be able to use and explain the rules feature by...</p> <ol style="list-style-type: none"> 1. Defining reasons to use rules 2. Identifying steps for creating a new rule 3. Applying a new rule. <p>The course is designed for new and tenured Microsoft Support Agents.</p> <p>Tenured Agents If you are a tenured agent, please click on the Tenured Agents Button to move to the Instructions on Creating Rules section.</p>	<p>Image Block with Text</p> <p>Video</p> <p>Heading</p> <p>Subheading</p> <p>Numbered list</p> <p>Heading</p> <p>Button Stack</p>	

	<p>If you are a new agent, please continue your Exploring Outlook Training by clicking on the New Agents Button to move to Reasons for Using Rules section.</p>		
<p>Reasons for Using Rules</p>	<p>Picture of someone diving</p> <p>Since you have been diving into the features of Outlook, let's continue with how to create rules.</p> <p>What are Rules?</p> <p>Rules are a way to automate actions in Outlook that you would normally have to do manually.</p> <p>Rules are actions that are taken if a message meets predetermined criteria.</p> <p>Why are they important?</p> <p>Why rules are important</p> <p>You can create rules that will change the level of importance of messages as they come in. These rules allow you to do the following.</p> <p>Flip each card below to learn more.</p> <p>Picture on front side – Text on back Move to another folder Respond to an email message Flag important messages</p> <p>How do rules help manage emails?</p> <p>How rules help manage email messages</p> <p>The Rules Wizard helps you design rules to manage messages. Click on each tab to find out how rules will help your customers</p>	<p>Image and Text</p> <p>Heading</p> <p>Bulleted list</p> <p>Continue Button</p> <p>Heading</p> <p>Subheading</p> <p>Flashcard grid</p> <p>Continue button</p> <p>Heading</p> <p>Subheading</p>	

	<p>Stay Organized – These rules help you filter, file, and follow up on messages. For example, you can create a rule for a specific sender, such as Ann Jones, to automatically be moved to the folder, Project Leader. (Picture under)</p> <p>Stay Up to Date – These rules will notify you when you receive a particular message. For example, you can create a rule, such as when the CEO sends a message, that a selected sound automatically plays. (Picture under)</p> <p>Custom Time Saver - These are rules you can completely customize. For example, you can set up automatic responses to an incoming email when out of the office. (Picture under)</p> <p>How are they applied</p> <p>How rules are Applied</p> <p>When explaining to the customer how to set up a rule, there are 3 main steps.</p> <p>Name – Name the Rule Condition – Conditions tell the computer what to look for Action – Actions tell the computer what to do when a condition is met.</p> <p>Rules only run on your inbox. They don't run on other folders.</p> <p>Continue for a Quick Knowledge Check</p> <p>Question: You are on a call with a customer who is frustrated with missing emails. The customer asks, "Can you explain to me what rules are?" How could you assist? Choose the best answer and click submit.</p>	<p>Tabs</p> <p>Continue button</p> <p>Heading</p> <p>Subheading</p> <p>Flashcard grid</p> <p>Note</p> <p>Continue button</p> <p>Multiple Choice</p>	
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	<p>Choice 1: Currently Outlook does not have rules to assist you with those missing emails. We are sorry for the inconvenience.</p> <p>Choice 2: Yes, I am happy to explain the importance of using rules. By using the rules feature, you can automatically organize and prioritize your messages. Would you like me to show you how to create a rule? (correct answer)</p> <p>Choice 3: Yes, I am happy to assist you with organizing your emails. I am thinking rules would be good to use but I am not sure. I have never created these rules. Please hold for assistance.</p> <p>Feedback: Correct: Yes! Great job explaining the importance of using rules.</p> <p>Incorrect: Nice try! The correct response would be: Yes, I am happy to explain the importance of using rules. By using the rules feature, you can automatically organize and prioritize your messages. Would you like me to show you how to create a rule?</p> <p>Question: What are the three main steps to create a rule? Choose the best answer and click submit.</p> <p>Choice 1: Notice, Condition, and Action</p> <p>Choice 2: Name, Step, and Action</p> <p>Choice 3: Name, Condition, and Action (correct answer)</p> <p>Feedback: Correct: Yes! Great job identifying the three main steps to create a rule. Name, Condition and Action</p> <p>Incorrect: Nice try but the three main steps to create a rule are Name, Condition and Action.</p> <p>Now Let's Create a Rule</p>	<p>Multiple Choice</p> <p>Continue button</p>	
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<p>Instructions on Creating a Rule</p>	<p>Creating Rules on Outlook Web</p> <p>This step-by-step process will go over one of the options for creating and using rules.</p> <p>In this case, we will move all emails from Jane Smith to the Technology folder.</p> <p>Expand each box below for the steps.</p> <p>(Screen shots for each step will be under the description.)</p> <p>Step 1 Log in to your Outlook Web Email. Click on the Settings icon in the top right corner. It is the gear shape.</p> <p>Step 2 Click on the View all Outlook settings</p> <p>Step 3 Under the Mail settings, click Rules</p> <p>Step 4 Click on + Add new rule</p> <p>Step 5 Type in the NAME of the rule you want to make. This example is Test Rule</p> <p>Step 6 Select a condition (Conditions tell the computer what to look for.) Click on the down arrow and select From under People</p> <p>Step 7 Select the email address of the sender whose emails you want to move.</p>	<p>Heading</p> <p>Subheading</p> <p>Accordion</p>	
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	<p>Step 8 Select an action. (Actions tell the computer what to do when a condition is met.) Click on the down arrow and, in this case, select Move to because we are moving the emails from the inbox to a specific folder.</p> <p>Step 9 Select the folder you want to place the emails in. For this example, we are selecting the Technology folder, which has already been created. If you need to create a folder, click on New folder.</p> <p>Step 10 Click on the Run rule now box. This will start the rule now.</p> <p>Then, click Save</p> <p>Step 11 The new rule has been added. You can turn this rule on and off whenever you like by selecting the Blue Toggle button.</p> <p>Step 12 Congratulations! The new rule has been set. Think of all the possibilities that rules can do to keep you organized.</p> <p>Now's Let's Try It!</p>		
<p>Try Creating a Rule</p>	<p>Now it's your turn to practice making a rule</p> <p>Storyline Try It Sample</p> <p>Great job! Now Let's Wrap Things Up</p>	<p>Continue button</p> <p>Heading</p> <p>Storyline block</p> <p>Continue button</p>	
<p>Summary/ Conclusion</p>	<p>Summary of Rules</p> <p>Now that you have taken this course, you can explain why we use the rules feature and how to support your customers.</p> <p>Before we finish, watch this quick video.</p>	<p>Heading</p> <p>Subheading</p> <p>Heading</p>	

	<p>Video with happy customer.</p> <p>Below are additional resources.</p> <p>Creating Rules in Outlook pdf - Job Aid</p> <p>Microsoft Support Help Article - https://support.microsoft.com/en-us/office/use-inbox-rules-in-outlook-8400435c-f14e-4272-9004-1548bb1848f2</p> <p>Video Demonstration – Link to video</p> <p>Thank you for completing this course.</p>	<p>Video</p> <p>Heading</p> <p>PDF</p> <p>Continue button</p> <p>Heading</p>	
Tenured Agents	<p>Refresher</p> <p>Below is a video on creating rules in Outlook.</p> <p>Video</p> <p>If you would like to review any of the other content in this course, click on the buttons below.</p> <p>Reasons for Creating Rules – Link to Lesson</p> <p>Step by Step Instructions on Creating Rules – Link to Lesson</p> <p>Below are additional resources</p> <p>Creating Rules in Outlook pdf - Job Aid</p> <p>Microsoft Support Help Article - https://support.microsoft.com/en-us/office/use-inbox-rules-in-outlook-8400435c-f14e-4272-9004-1548bb1848f2</p> <p>Thank you!</p>	<p>Heading</p> <p>Subheading</p> <p>Video</p> <p>Subheading</p> <p>Button</p> <p>Heading</p> <p>PDF</p> <p>Button</p> <p>Heading</p>	