**OUTLOOK FOLDER & FILTER INSTRUCTIONS**

## Part I walks you through the process of creating a separate folder to organize your Advanced Execution class discussion group messages (e-Journal messages) and Part II helps you create a filter (rule) to automatically sort e-mails into the designated folder. This will keep your discussion group e-mails organized together and because the e-mail does not go to your inbox and mix with other messages, it will keep you focused on your current task.

## PART I: INSTRUCTIONS TO CREATE THE ADVANCED EXECUTION PROGRAM Jordan DISCUSSION GROUP FOLDER

1. Launch/open Outlook
2. On the **File** menu, point to **New**, then click **Folder**
3. In the **Name** box, enter your Advanced Execution Program Class Name (e.g. Jordan, Iacocca, etc.), or something else you choose to name the folder
4. In the Folder contains box, select **Mail and Post Items**
5. In the box marked “Select where to place the folder:”, highlight **Inbox**

## PART II: INSTRUCTIONS FOR USING FILTERS IN OUTLOOK

##### To create a rule for INCOMING messages (messages you receive):

1. Launch/open Outlook
2. Make sure you are in the **Mail** screen
3. a. In Outlook 2010: From the Home tab, select Rules, then Manage Rules & Alerts

b. In Outlook 2003 & 2007: From the Tools menu, select Rules and Alerts

1. Click **New Rule**
2. a. In Outlook 2010: Under Step 1: Select **Sent to a public group to a folder**

b. In Outlook 2003 & 2007: Under Step 1: Select a template, select **Move messages sent to a distribution list to a folder**

1. Under Step 2: Edit the rule description, select **to people or distribution list**
2. Type the name of your Advanced Execution class@simplelists.com (e.g. [jordan@stagen.simplelists.com](mailto:jordan@stagen.simplelists.com), [Iacocca@stagen.simplelists.com](mailto:Iacocca@stagen.simplelists.com), etc.) into the **To** box
3. Click **OK**
4. Under Step 2: Edit the rule description**,** click **move it to the specified folder**
5. Find and select the new folder you created (from Part I, Step #3)
6. Click **OK**
7. Click **Next / Next / Next / Next** (4 times)
8. Finish Rule Setup, Under *Step 1*, specify a name by typing **Stagen Advanced Execution Program**
9. Click **Finish**
10. Click **Apply** and then Click **OK**