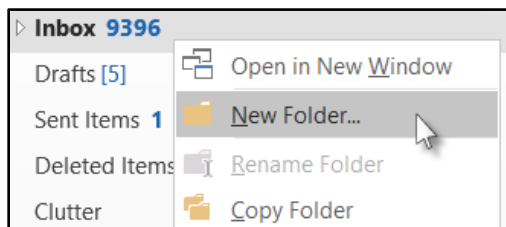


## Organizing Adobe Sign Emails in Outlook Step-by-step Guide

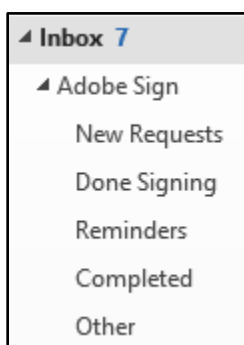
### Step 1: Create folders in Outlook

From your Outlook *Inbox*:

1. In the left pane of **Mail**, right-click where you want to add the folder, and then click **New Folder**.



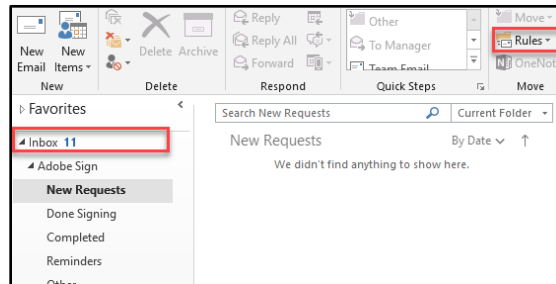
2. In the **Name** box, enter **Adobe Sign** for the folder, and press Enter.
3. Right-click on the **Adobe Sign folder**, and then click **New Folder**. In the Name box, enter the sub-folder names listed below. Repeat this process until all five sub-folders are created.
  - a. Sub-folder Names
    - New Requests
    - Done Signing
    - Completed
    - Reminders
    - Other



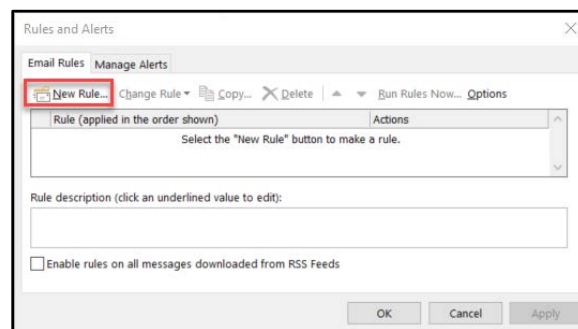
## Step 2: Create rules for the Adobe Sign sub-folders

From your Outlook *Inbox*:

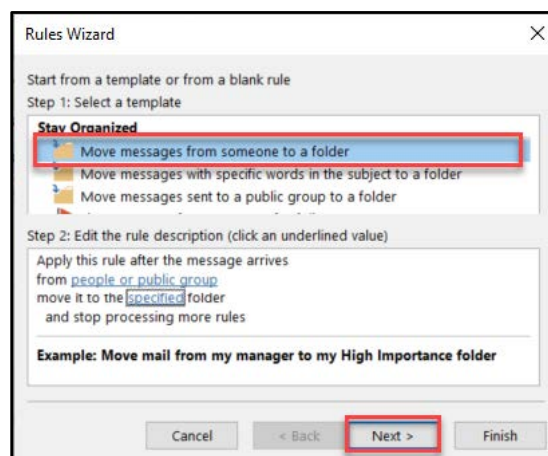
1. Click **Rules**
  - a. Select **Manage Tools and Alerts**



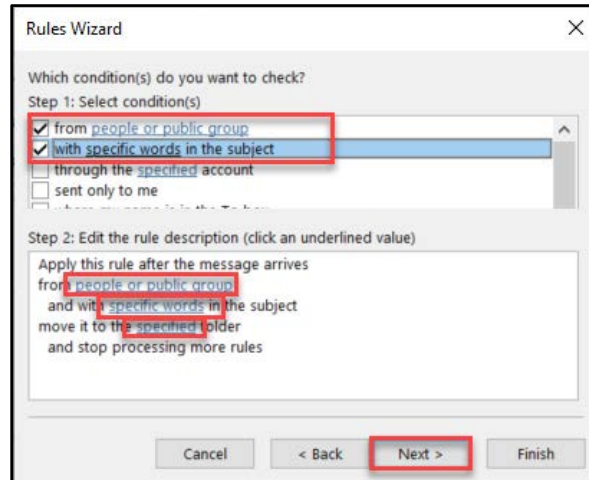
2. Create a rule for the *New Requests* sub-folder
  - a. In the *Rules and Alerts* window, Click **New Rules**



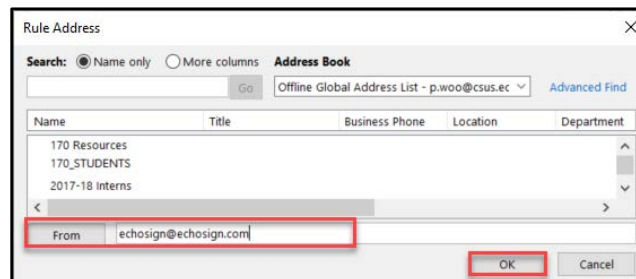
- b. The *Rules Wizard* window opens
  - i. Click on **Move message from someone to a folder**, click **Next**



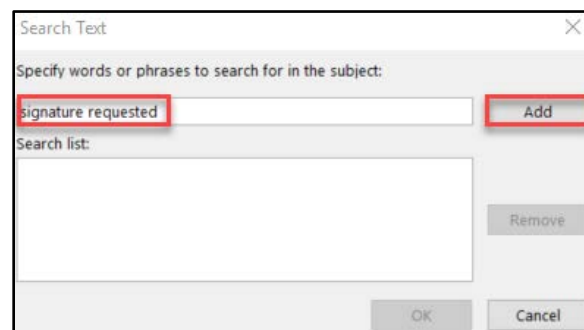
- ii. In the next *Rules Wizard* screen
  - (a) Navigate to *Step 1: Select two condition*
    - (i) Ensure that **from people or public group** is selected
    - (ii) Ensure that **with specific words in the subject** is selected as well



- (b) Navigate to *Step 2: Edit the rule description*
  - (i) Click **People or public group**
    - 1. The *Rule Address* window opens
      - a. In the **From** field, type [echosign@echosign.com](mailto:echosign@echosign.com)
      - b. Click **OK**

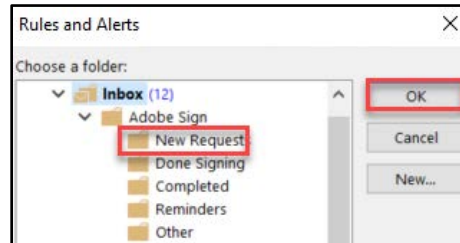


- (ii) Click **specific words**
  - 1. The *Search Text* window opens
    - a. Type **signature requested**, click **Add**
    - b. Type **confirm your signature**, click **Add**
    - c. Click **OK**



(iii) Click **specified folder**

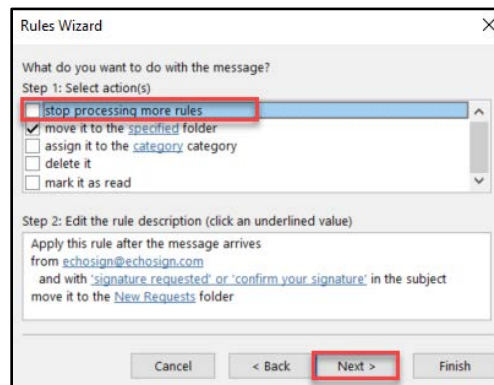
1. The *Rules and Alerts* window opens
  - a. Select the *New Requests* sub-folder
  - b. Click **OK**



(iv) Click **Next**

(c) In the next *Rules Wizard* screen

- (i) Navigate to *Step 1: Select Actions*
  1. Uncheck **stop processing more rules**
- (ii) Click **Next**

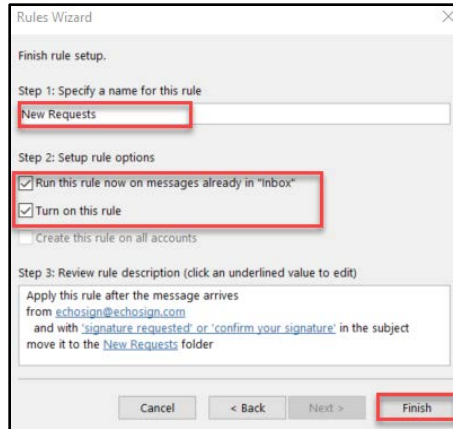


(d) In the next *Rules Wizard* screen

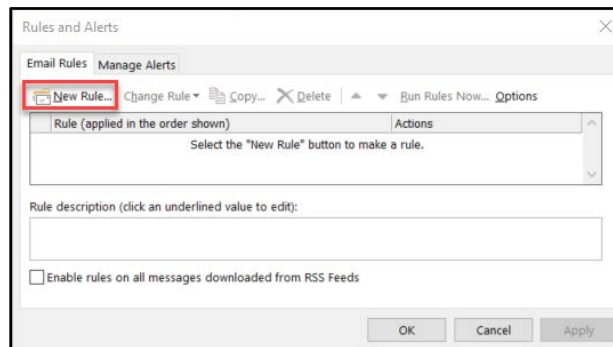
- (i) No actions needed for this screen
- (ii) Click **Next**

(e) The *Finish rule setup* is the last screen

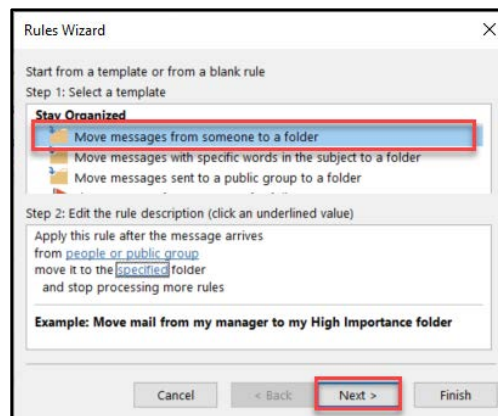
- (i) Navigate to *Step 1: Specify a name for this rule*
  1. Remove the auto default name and type **New Requests**
- (ii) Navigate to *Step 2: Setup rule options*
  1. Select **Run this rule now on messages already in inbox**
  2. Ensure that **turn on this rule** is selected
- (iii) Click **Finish**



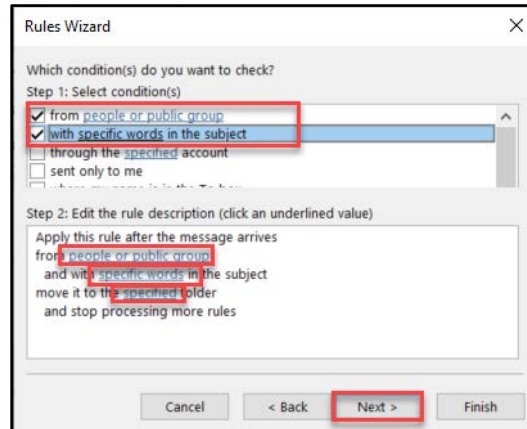
3. Create a rule for the *Done Signing* sub-folder
  - a. In the *Rules and Alerts* window, Click **New Rules**



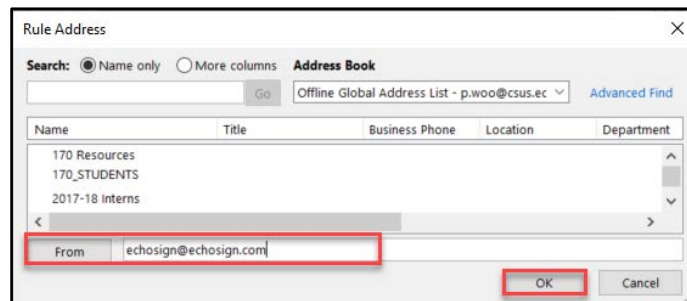
- b. The *Rules Wizard* window opens
      - i. Click on **Move message from someone to a folder**, click **Next**



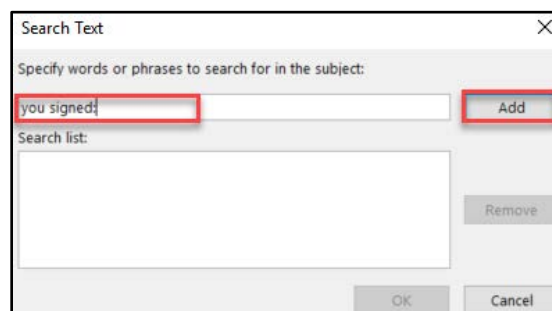
- ii. In the next *Rules Wizard* screen
  - (a) Navigate to *Step 1: Select two condition*
    - (i) Ensure that **from people or public group** is selected
    - (ii) Ensure that **with specific words in the subject** is selected as well



- (b) Navigate to *Step 2: Edit the rule description*
  - (i) Click **People or public group**
    1. The *Rule Address* window opens
      - a. In the **From** field, type [echosign@echosign.com](mailto:echosign@echosign.com)
      - b. Click **OK**

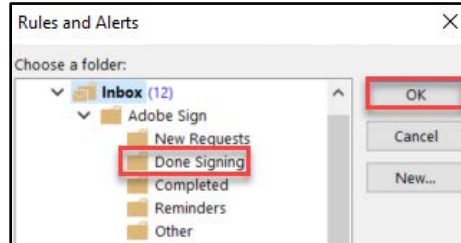


- (ii) Click **specific words**
  1. The *Search Text* window opens
    - a. Type **you signed:**, click **Add**
    - b. Click **OK**



(iii) Click **specified folder**

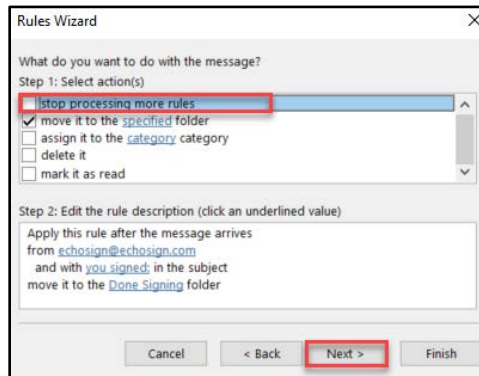
1. The *Rules and Alerts* window opens
  - a. Select the *Done Signing* sub-folder
  - b. Click **OK**



(iv) Click **Next**

(c) In the next *Rules Wizard* screen

- (i) Navigate to *Step 1: Select Actions*
  1. Uncheck **stop processing more rules**
- (ii) Click **Next**

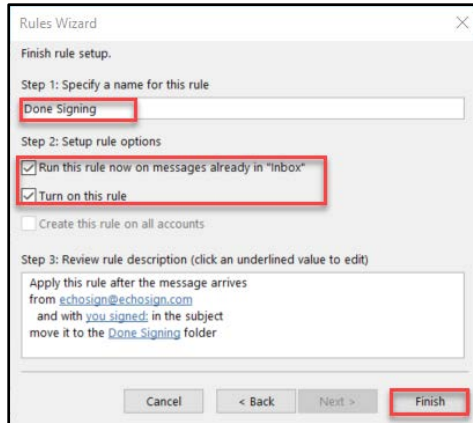


(d) In the next *Rules Wizard* screen

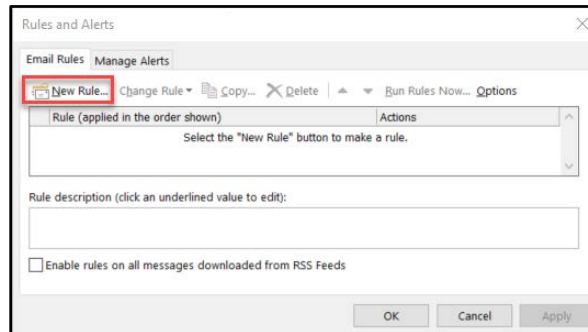
- (i) No actions needed for this screen
- (ii) Click **Next**

(e) The *Finish rule setup* is the last screen

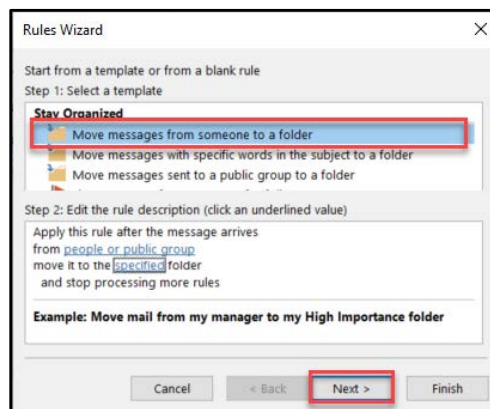
- (i) Navigate to *Step 1: Specify a name for this rule*
  1. Remove the auto default name and type **Done Signing**
- (ii) Navigate to *Step 2: Setup rule options*
  1. Select **Run this rule now on messages already in inbox**
  2. Ensure that **turn on this rule** is selected
- (iii) Click **Finish**



4. Create a rule for the *Completed* sub-folder
  - a. In the *Rules and Alerts* window, Click **New Rules**

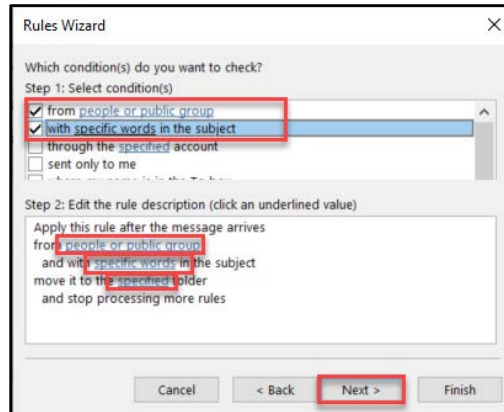


- b. The *Rules Wizard* window opens
      - i. Click on **Move message from someone to a folder**, click **Next**

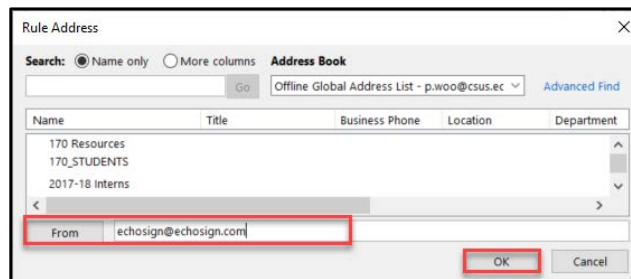




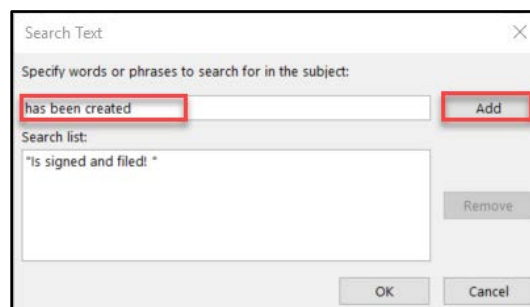
- ii. In the next *Rules Wizard* screen
  - (a) Navigate to *Step 1: Select two condition*
    - (i) Ensure that **from people or public group** is selected
    - (ii) Ensure that **with specific words in the subject** is selected as well



- (b) Navigate to *Step 2: Edit the rule description*
  - (i) Click **People or public group**
    1. The *Rule Address* window opens
      - a. In the **From** field, type [echosign@echosign.com](mailto:echosign@echosign.com)
      - b. Click **OK**

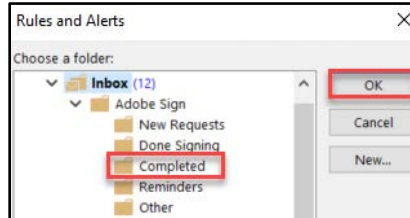


- (ii) Click **specific words**
  1. The *Search Text* window opens
    - a. Type **Is signed and filed!**, click **Add**
    - b. Type **has been created**, click **Add**
    - c. Click **OK**



(iii) Click **specified folder**

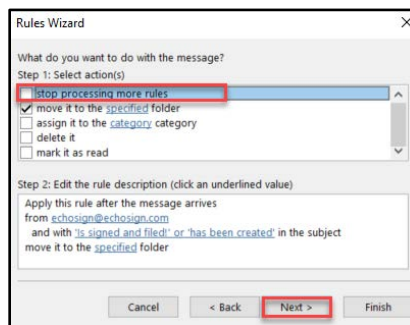
1. The *Rules and Alerts* window opens
  - a. Select the *Completed* sub-folder
  - b. Click **OK**



(iv) Click **Next**

(c) In the next *Rules Wizard* screen

- (i) Navigate to *Step 1: Select Actions*
  1. Uncheck **stop processing more rules**
- (ii) Click **Next**

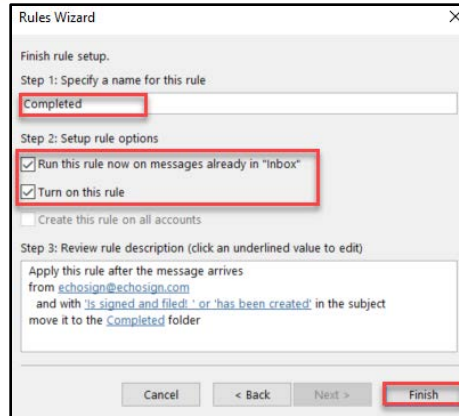


(d) In the next *Rules Wizard* screen

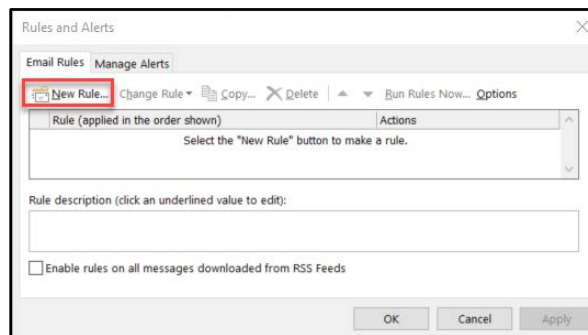
- (i) No actions needed for this screen
- (ii) Click **Next**

(e) The *Finish rule setup* is the last screen

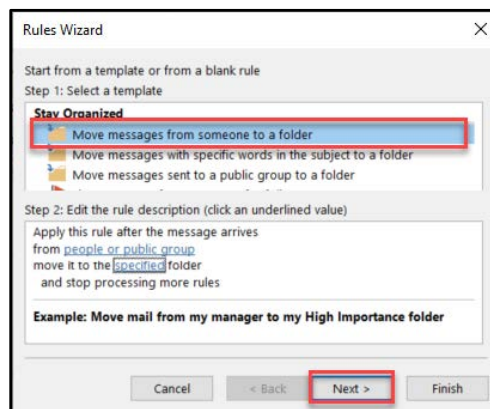
- (i) Navigate to *Step 1: Specify a name for this rule*
  1. Remove the auto default name and type **Done Signing**
- (ii) Navigate to *Step 2: Setup rule options*
  1. Select **Run this rule now on messages already in inbox**
  2. Ensure that **turn on this rule** is selected
- (iii) Click **Finish**



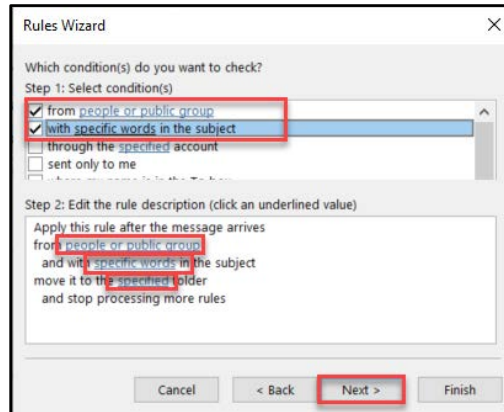
- 5. Create a rule for the *Reminders* sub-folder
  - a. In the *Rules and Alerts* window, Click **New Rules**



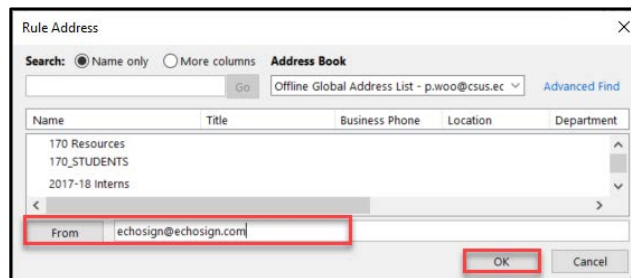
- b. The *Rules Wizard* window opens
      - i. Click on **Move message from someone to a folder**, click **Next**



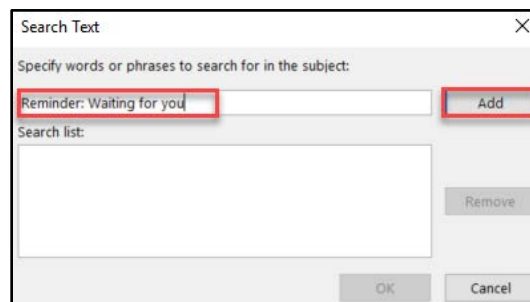
- ii. In the next *Rules Wizard* screen
  - (a) Navigate to *Step 1: Select two condition*
    - (i) Ensure that **from people or public group** is selected
    - (ii) Ensure that **with specific words in the subject** is selected as well



- (b) Navigate to *Step 2: Edit the rule description*
  - (i) Click **People or public group**
    1. The *Rule Address* window opens
      - a. In the **From** field, type [echosign@echosign.com](mailto:echosign@echosign.com)
      - b. Click **OK**

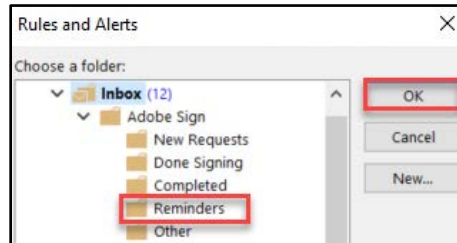


- (ii) Click **specific words**
  1. The *Search Text* window opens
    - a. Type **Reminder: Waiting for you**, click **Add**
    - b. Click **OK**



(iii) Click **specified folder**

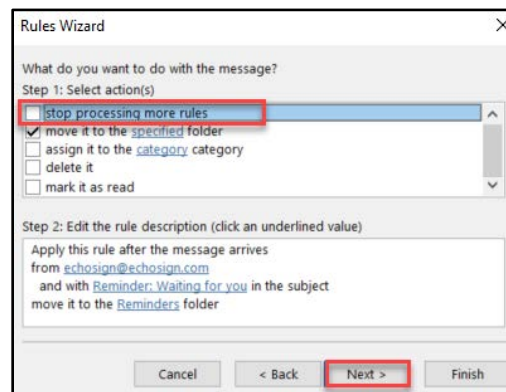
1. The *Rules and Alerts* window opens
  - a. Select the *Reminders* sub-folder
  - b. Click **OK**



(iv) Click **Next**

(c) In the next *Rules Wizard* screen

- (i) Navigate to *Step 1: Select Actions*
  1. Uncheck **stop processing more rules**
- (ii) Click **Next**

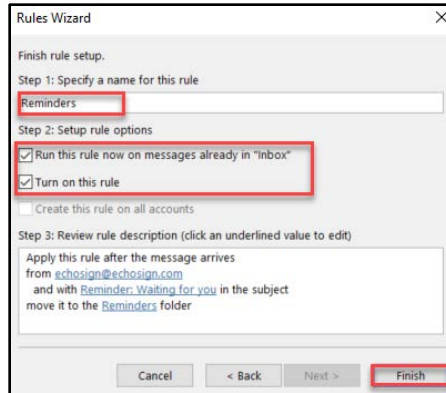


(d) In the next *Rules Wizard* screen

- (i) No actions needed for this screen
- (ii) Click **Next**

(e) The *Finish rule setup* is the last screen

- (i) Navigate to *Step 1: Specify a name for this rule*
  1. Remove the auto default name and type **Done Signing**
- (ii) Navigate to *Step 2: Setup rule options*
  1. Select **Run this rule now on messages already in inbox**
  2. Ensure that **turn on this rule** is selected
- (iii) Click **Finish**



6. Click **OK**. You will not be creating a rule for the sub-folder **Others**. The sub-folder will be used on an as-needed base.