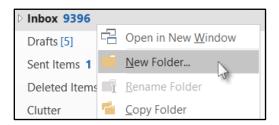


Organizing Adobe Sign Emails in Outlook Step-by-step Guide

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

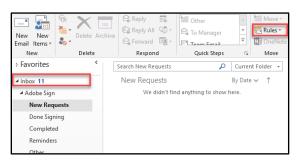
⊿ Inbox 7
▲ Adobe Sign
New Requests
Done Signing
Reminders
Completed
Other



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

10.000	anage Alerts			
New Rule	Change Rule 🕶 🖺 Copy 🗙 Delete	🔺 💌 <u>R</u> un Rules	Now Options	
Rule (appli	ed in the order shown)	Actions		1
	Select the "New Rule" button	to make a rule.		
				4
la description	o (click an underlined value to adit):			
ule description	n (click an underlined value to edit):			
ule description	n (click an underlined value to edit):			
	n (click an underlined value to edit):	de		

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

	from a bla	nk rule		
Charles and the second				
-			in the second second second	
				a folder
Nove messages	sent to a p	public group	to a folder	
is rule after the ople or public o to the specified	message a roup folder		ned value)	
		anager to n	ny High Impo	rtance folder
	ncel	< Back	Next >	Finish
	elect a template canized Move messages Move messages Move messages dit the rule descr is rule after the sople or public of to the <u>specified</u> op processing n	elect a template ganized Move messages from som Move messages with speci- Move messages sent to a p dit the rule description (clici- his rule after the message is ople or public group to the <u>Specified</u> folder op processing more rules	manized Nove messages from someone to a for Nove messages with specific words in Nove messages sent to a public group that the rule description (click an underling is rule after the message arrives sople or public group to the specifical tolder op processing more rules	elect a template panized Vove messages from someone to a folder Vove messages with specific words in the subject to vove messages sent to a public group to a folder dit the rule description (click an underlined value) dit the rule description (click an underlined value) is rule after the message arrives sople or public group to the <u>Specified</u> folder



- (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

Rules Wizard				×
Which condition(s) do y Step 1: Select condition		theck?		
from people or put with specific words through the specific sent only to me	in the subject ad account			î
Apply this rule after the front people or public and with specific wo move it to the specific and stop processing	ne message coroup rds in the su	arrives	a renusy	

- (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
 - b. Click **OK**

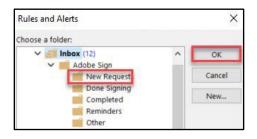
search: Name o	nly OMore columns	Address Book		
	Go	Offline Global Address L	List - p.woo@csus.ec 🗸	Advanced Find
Name	Title	Business Ph	none Location	Department
170 Resources 170 STUDENTS				
2017-18 interns				
<				>
From ech	osign@echosign.com			

- (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





- 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

What do you want to do Step 1: Select action(s)	o with the m	nessage?		
stop processing mo move it to the <u>speci</u> assign it to the <u>cate</u> delete it	fied folder	ory		^
mark it as read Step 2: Edit the rule des	cription (cli	ick an underlined	d value)	~
Apply this rule after th from <u>echosign@echos</u> and with <u>'signature r</u>	ign.com	or 'confirm your	signature' in the	subject

- (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 inbox
 - 2. Ensure that turn on this rule is selected
 - (iii) Click Finish



Rules Wizard	×
Finish rule setup.	
Step 1: Specify a name for this rule	
New Requests	
Step 2: Setup rule options	
Run this rule now on messages already in "Inbox"	
Turn on this rule	
Create this rule on all accounts Step 3: Review rule description (click an underlined value to edit)	
Apply this rule after the message arrives from <u>echosion@echosion.com</u> and with ' <u>signature requested' or 'confirm your signature'</u> in the subject move it to the <u>New Requests</u> folder	
Cancel < Back Next > Fir	nish

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

nail Rules Manage Alerts		
New Rule Change Rule - 🖹 Copy 🗙 D	elete 🔺 👻 <u>B</u> un Rules Now Options	
Rule (applied in the order shown)	Actions	~
Select the "New Rule"	button to make a rule.	
		4
		~
le description (click an underlined value to edit):		2
le description (click an underlined value to edit):		~
		2
ule description (click an underlined value to edit): Enable rules on all messages downloaded from f	RSS Feeds	~
	RSS Feeds	

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

Rules \	Wizard	×
Start fr	rom a template or from a blank rule	
Step 1:	: Select a template	
Stav	Organized	
1	Move messages from someone to a folder	
1. A. A.	Move messages with specific words in the subject to a	folder
-	Move messages sent to a public group to a folder	
-		
Step 2:	2: Edit the rule description (click an underlined value)	
	ly this rule after the message arrives	
	e it to the specified folder	
	d stop processing more rules	
unita	stop processing more roles	
Exam	nple: Move mail from my manager to my High Import	ance folder
	Cancel < Back Next >	Finish



- (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

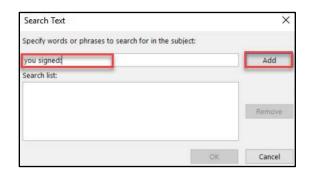
Which condition(s) do yo Step 1: Select condition(
 from people or pub with specific words in through the specific words in through the specific words in through the specific sent only to me 	n the subject	î
	cription (click an underline	17 (17 17 17 17 17 17 17 17 17 17 17 17 17 1
Apply this rule after the from people or public and with specific wor- move it to the specific and stop processing	group ds in the subject d older	

- (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
 - b. Click OK

Search: 🔘	Name only	More columns	Address Boo	k		
		Go	Offline Glob	al Address List - p.	woo@csus.ec ∨	Advanced Find
Name		Title		Business Phone	Location	Department
170 Reso						
170_STU						
2017-18	interns					
<						>
From	echosian@e	chosign.com				

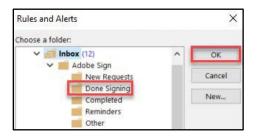
(ii) Click specific words

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





- 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 inbox
 - 2. Ensure that turn on this rule is selected
 - (iii) Click Finish



Rules Wizard				×
Finish rule setup.				
Step 1: Specify a na	ame for this rule			
Done Signing				
Step 2: Setup rule o	options			
Run this rule no	w on messages	already in "Inbo	x*	
Turn on this rule	2			
Create this rule	on all accounts			
Step 3: Review rule	description (cli	ck an underlined	value to edit)	
Apply this rule aft from <u>echosign@e</u> and with <u>you sig</u> move it to the <u>Do</u>	chosign.com med: in the subj	ect		

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

- New Kule	Change Rule - 🖹 Copy 🗙 Delet	te 🔺 🖤	Bun Rules	s Now Options	
Rule (applie	in the order shown)		Actions		
					2
de description	(click an underlined value to edit):				
ule description	(click an underlined value to edit):				

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

Rules Wizard				×
	plate or from a blank r	ule		
Step 1: Select a 1				
Stav Organize	d			
Move m	essages from someon	e to a folder		
Move m	essages with specific w	ords in the s	ubject to a folde	er
Move m	essages sent to a publ	ic group to a	afolder	
Step 2: Edit the I	ule description (click ar	underlined	value)	
from people o move it to the	after the message arriv r <u>public group</u> specified folder cessing more rules	res		
Example: Mov	e mail from my mana	ger to my H	igh Importance	folder
	Cancel	< Back	Next >	Finish



- (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

Which condition(s) do y Step 1: Select condition		
✓ from people or put ✓ with specific words ↓ through the specific	in the subject	^
Step 2: Edit the rule de	scription (click an underlined value	2)
Apply this rule after the from people or public and with specific wo move it to the specific	c group irds in the subject ed older	
Apply this rule after the from people or public and with specific wo	c group irds in the subject ed older	

- (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 <u>echosign@echosign.com</u>
 - b. Click **OK**

Search: (Name only	O More columns	Address Bo	ook		
		Go	Offline Glo	bal Address List - p	.woo@csus.ec ~	Advanced Find
Name		Title		Business Phone	Location	Department
	Resources					
-	TUDENTS					
<	18 Interns					>
From	11	an@echosign.com		-		

- (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

Search Text	×
Specify words or phrases to search for in the subject:	
has been created	Add
Search list:	
"Is signed and filed! "	
	Remove
OF	Cancel



- 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

What do you wan Step 1: Select acti	to do with the message? on(s)	
assign it to th delete it mark it as rea	<u>specified</u> folder e <u>category</u> category d	· · · · · · · · · · · · · · · · · · ·
Apply this rule a from echosign@	ned and filed!' or 'has been crea	

- (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 inbox
 - 2. Ensure that turn on this rule is selected
 - (iii) Click Finish



Rules Wizard			×
Finish rule setup.			
Step 1: Specify a name for this rule			
Completed			
Step 2: Setup rule options		- 12	
Run this rule now on messages	already in "Inbo	x*	
Turn on this rule			
Create this rule on all accounts		_	
Step 3: Review rule description (cli	ck an underlined	value to edit)	
Apply this rule after the message from <u>echosign@echosign.com</u> and with <u>'Is signed and filed!</u> ' c move it to the <u>Completed</u> folder		<u>ted'</u> in the subje	ect
Cancel	< Back	Next >	Finish

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

New Rule	Change Rule •	Copy X Delete	A	Bun Rule	s Now Options	
Rule (appli	ed in the order sh	own)		Actions		1
le descriptio	n (click an underlir	and values to adit):				~
are descriptio	in (click an underlin	ied value to edity.				

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

Rules Wizard				>
	plate or from a bl	ank rule		
Step 1: Select a				
Move n	nessages from son	neone to a folde	r	
Move n	nessages with spec	ific words in the	subject to a fold	er
Move n	nessages sent to a	public group to	a folder	
Contraction and the	rule description (cli		i value)	
from people o move it to the	after the message r public group specified folder cessing more rules			
Example: Mov	ve mail from my n	nanager to my l	High Importance	folder
	Cancel	< Back	Next >	Finish



- (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

Which condition(s) di Step 1: Select conditi		eck?	
from people or p with specific wor through the spec sent only to me Step 2: Edit the rule o	ds in the subject		Î
Apply this rule after	the message ar	rives	
from people or put and with specific move it to the spec and stop process	vords in the subj med tolder	ect	

- (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 adobesign@adobesign.com
 - b. Click OK

Rule Address				
Search: Nam	e only OMore columns	Address Book		
	Go	Offline Global Address List - p.	woo@csus.ec ∨	Advanced Find
Name	Title	Business Phone	Location	Department
170 Resource 170_STUDEN				
2017-18 Inter	ms			
<				>
From	echosign@echosign.com			

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

Search Text		×
Specify words or phrases to search for in the	subject:	
Reminder: Waiting for you		Add
Search list:		1
		Remove
	OK	Cancel



- 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

Rules Wizard)
What do you want to o Step 1: Select action(s)		nessage?		
stop processing m move it to the spe assign it to the cat delete it mark it as read	cified folder	ory		•
Step 2: Edit the rule de Apply this rule after t from <u>echosign@echo</u> and with <u>Reminder</u> ; move it to the <u>Remin</u>	he message osign.com Waiting for	arrives		
	Cancel	< Back	Next >	Finish

- (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 inbox
 - 2. Ensure that turn on this rule is selected
 - (iii) Click Finish



Rules Wizard				×
Finish rule setup.				
Step 1: Specify a name	e for this rule			
Reminders				
Step 2: Setup rule opt	ions			
Run this rule now o	on messages	already in "Inbo	x*	
Turn on this rule				
Create this rule on	all accounts			
Step 3: Review rule de	scription (clin	k an underlined	value to edit)	
Apply this rule after from <u>echosign@echo</u> and with <u>Reminder</u> move it to the <u>Remin</u>	osign.com Waiting for		đ	
	Cancel	< Back	Next >	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.