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.
   - 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
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*
         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

![Rules and Alerts window]

(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 screen]

(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
3. Create a rule for the Done Signing sub-folder
   a. In the Rules and Alerts window, Click New Rules
   
   ![Rules Wizard](image)
   
   b. The Rules Wizard window opens
      i. Click on Move message from someone to a folder, click Next
      
      ![Rules Wizard](image)
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
             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 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

   ![Rules Wizard window]

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

   ![Rules Wizard window]
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

![Rules Wizard screenshot](image1)

(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

![Rule Address screenshot](image2)

(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 screenshot](image3)
(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 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**
   
   ![Rules and Alerts Window]

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

   ![Rules Wizard Window]
ii. In the next Rules Wizard screen
   (a) Navigate to Step 1: Select two condition
       (i) Ensure that \textit{from people or public group} is selected
       (ii) Ensure that \textit{with specific words in the subject} is selected as well

   ![Rules Wizard screenshot](image1)

   (b) Navigate to Step 2: Edit the rule description
       (i) Click People or public group
           1. The Rule Address window opens
               a. In the \textit{From} field, type \texttt{echosign@echosign.com}
               b. Click OK

   ![Rule Address screenshot](image2)

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

   ![Search Text screenshot](image3)
(iii) Click specified folder
   1. The Rules and Alerts window opens
      a. Select the Reminders sub-folder
      b. Click OK

![Rules and Alerts window](image)

(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 screen](image)

(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
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.