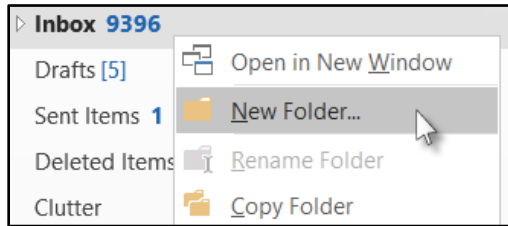


Organizing Adobe Sign Emails in Outlook Step-by-step Guide

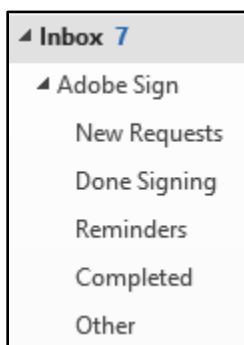
Step 1: Create folders in Outlook

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**.



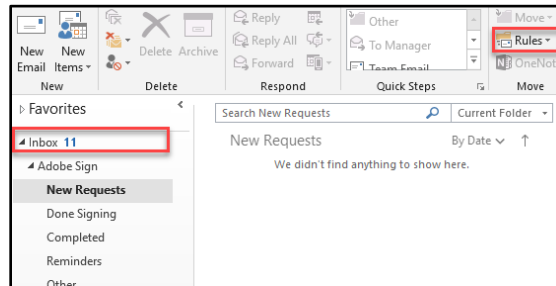
2. In the **Name** box, enter **Adobe Sign** for the folder, and press Enter.
3. Right-click on the **Adobe Sign folder**, and then click **New Folder**. In the Name box, enter the sub-folder names listed below. Repeat this process until all five sub-folders are created.
 - a. Sub-folder Names
 - New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



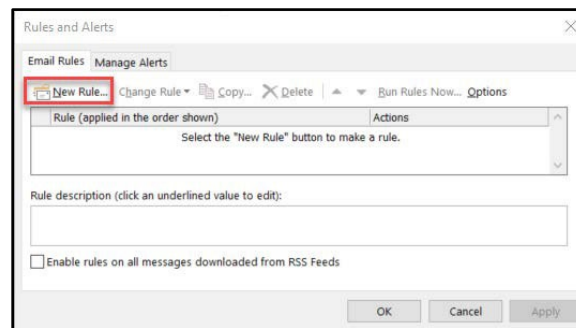
Step 2: Create rules for the Adobe Sign sub-folders

From your Outlook *Inbox*:

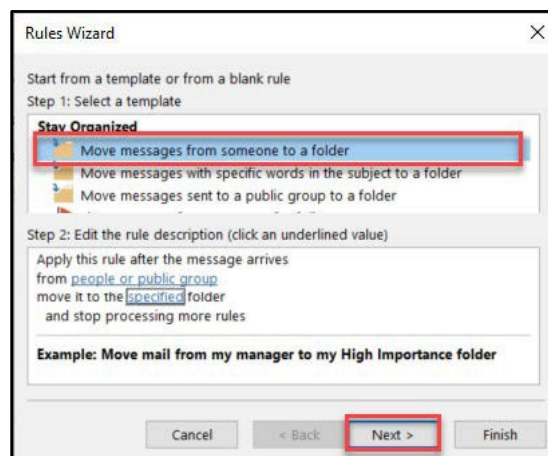
1. Click **Rules**
 - a. Select **Manage Tools and Alerts**



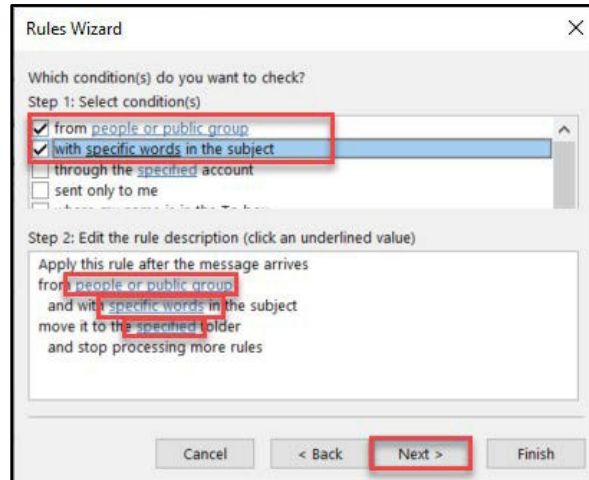
2. Create a rule for the *New Requests* sub-folder
 - a. In the *Rules and Alerts* window, Click **New Rules**



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

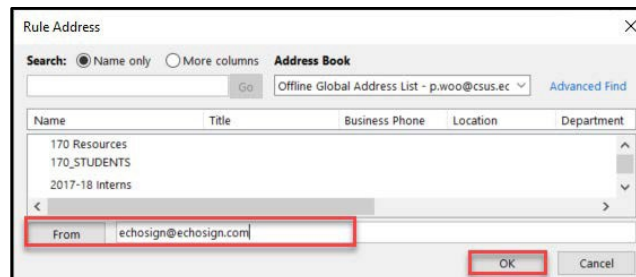


- ii. In the next *Rules Wizard* screen
 - (a) Navigate to *Step 1: Select two condition*
 - (i) Ensure that **from people or public group** is selected
 - (ii) Ensure that **with specific words in the subject** is selected as well



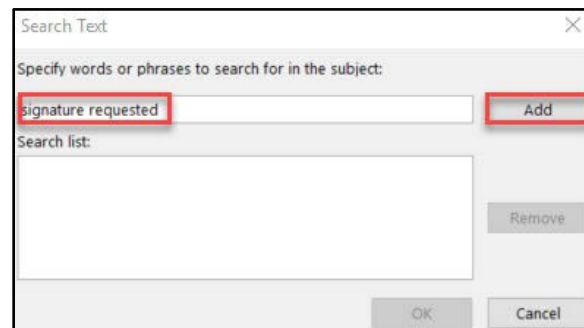
The screenshot shows the 'Rules Wizard' dialog box, Step 1: Select condition(s). The 'Which condition(s) do you want to check?' section has two conditions selected: 'from people or public group' and 'with specific words in the subject'. The 'Step 2: Edit the rule description (click an underlined value)' section shows the rule description: 'Apply this rule after the message arrives from people or public group and with specific words in the subject move it to the specified folder and stop processing more rules'. The 'Next >' button is highlighted.

- (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**



The screenshot shows the 'Rule Address' dialog box. The 'Search' section has 'Name only' selected. The 'Address Book' section shows a list of addresses. The 'From' field is populated with 'echosign@echosign.com'. The 'OK' button is highlighted.

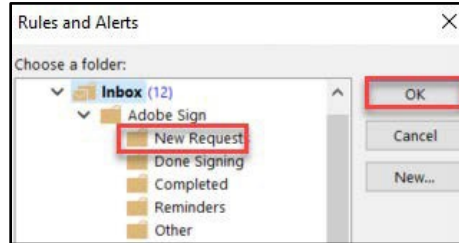
- (ii) Click **specific words**
 - 1. The *Search Text* window opens
 - a. Type **signature requested**, click **Add**
 - b. Type **confirm your signature**, click **Add**
 - c. Click **OK**



The screenshot shows the 'Search Text' dialog box. The 'Specify words or phrases to search for in the subject:' section has 'signature requested' entered. The 'Add' button is highlighted.

(iii) Click **specified folder**

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



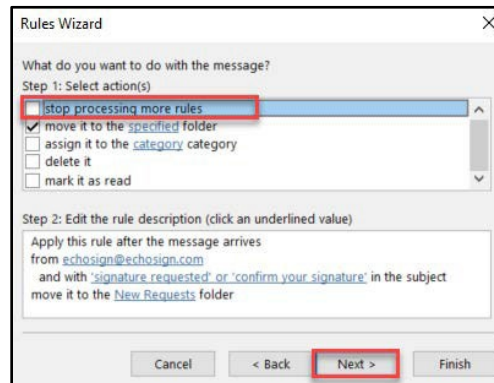
(iv) Click **Next**

(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

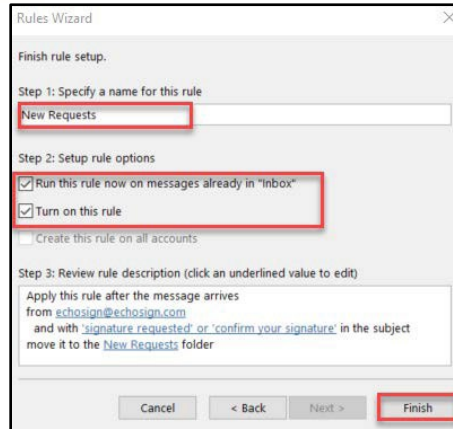
(i) Navigate to *Step 1: Specify a name for this rule*

1. Remove the auto default name and type **New Requests**

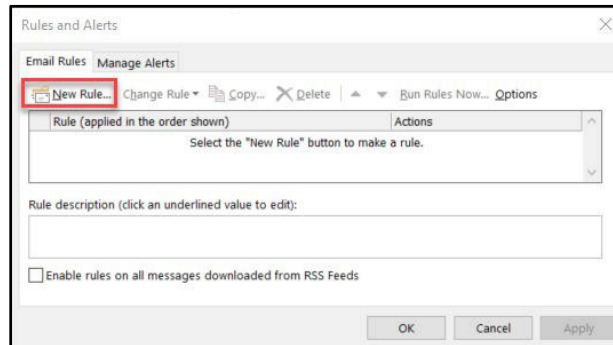
(ii) Navigate to *Step 2: Setup rule options*

1. Select **Run this rule now on messages already in box**
2. Ensure that **turn on this rule** is selected

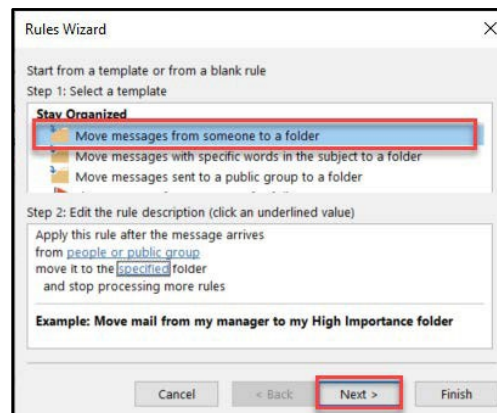
(iii) Click **Finish**



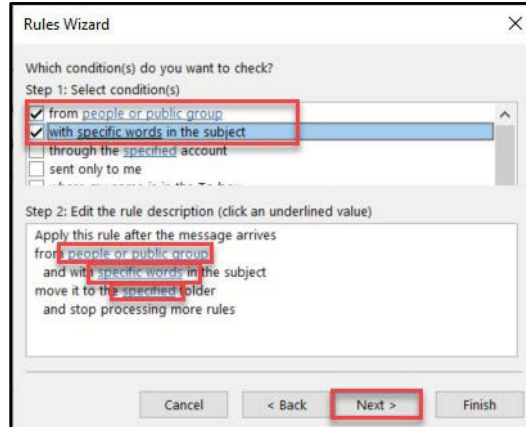
3. Create a rule for the *Done Signing* sub-folder
 - a. In the *Rules and Alerts* window, Click **New Rules**



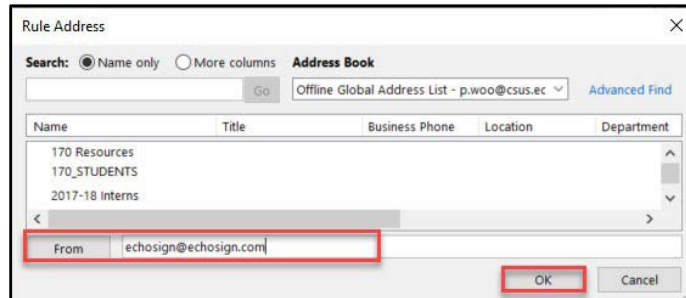
- b. The *Rules Wizard* window opens
 - i. Click on ***Move message from someone to a folder***, click **Next**



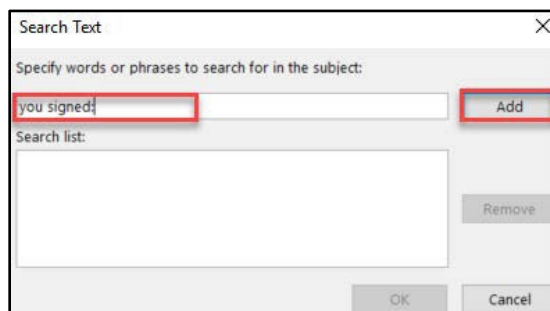
- ii. In the next *Rules Wizard* screen
 - (a) Navigate to *Step 1: Select two condition*
 - (i) Ensure that **from people or public group** is selected
 - (ii) Ensure that **with specific words in the subject** is selected as well



- (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
 - b. Click **OK**

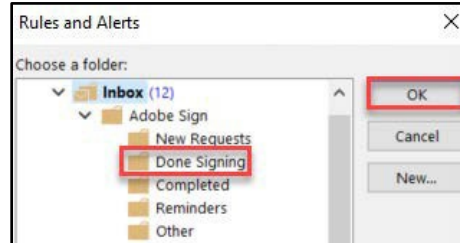


- (ii) Click **specific words**
 1. The *Search Text* window opens
 - a. Type **you signed:**, click **Add**
 - b. Click **OK**



(iii) Click **specified folder**

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



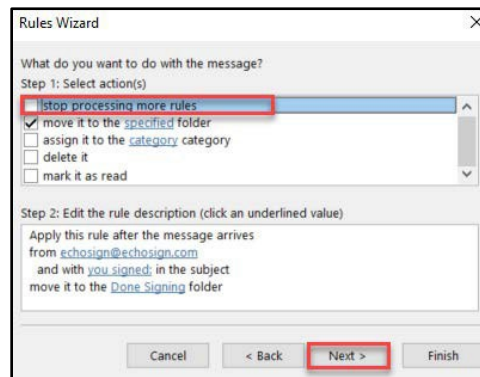
(iv) Click **Next**

(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

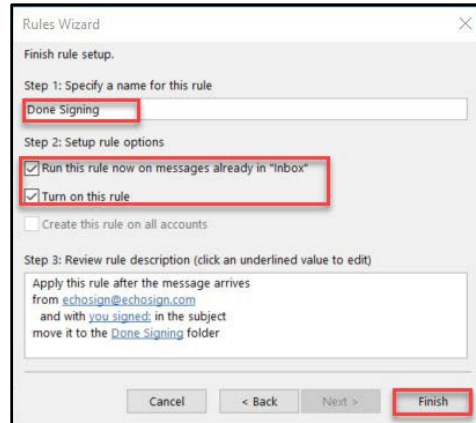
(i) Navigate to *Step 1: Specify a name for this rule*

1. Remove the auto default name and type **Done Signing**

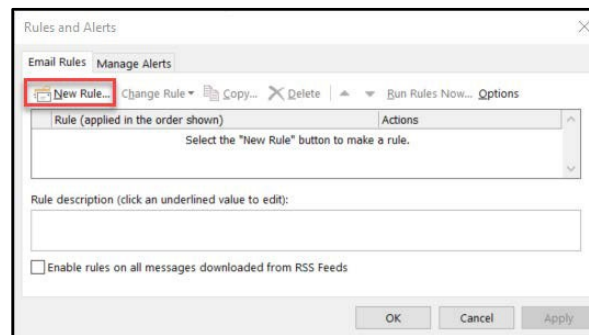
(ii) Navigate to *Step 2: Setup rule options*

1. Select **Run this rule now on messages already in inbox**
2. Ensure that **turn on this rule** is selected

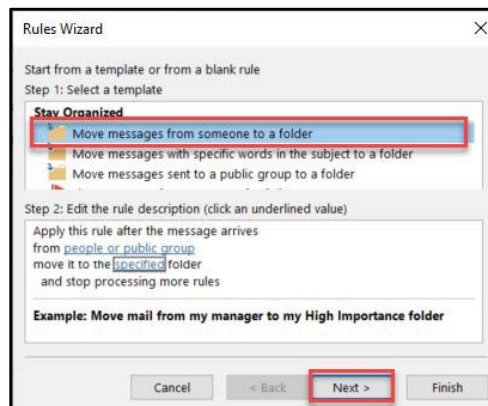
(iii) Click **Finish**



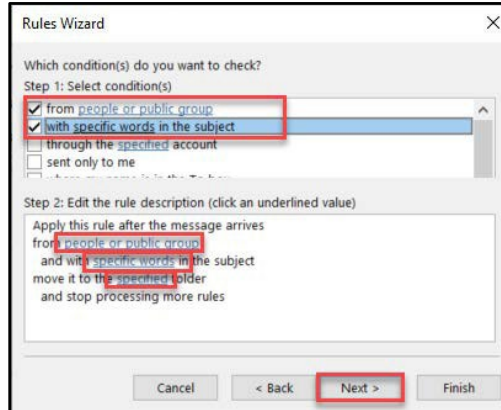
4. Create a rule for the *Completed* sub-folder
 - a. In the *Rules and Alerts* window, Click **New Rules**



- 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



Rules Wizard

Which condition(s) do you want to check?

Step 1: Select condition(s)

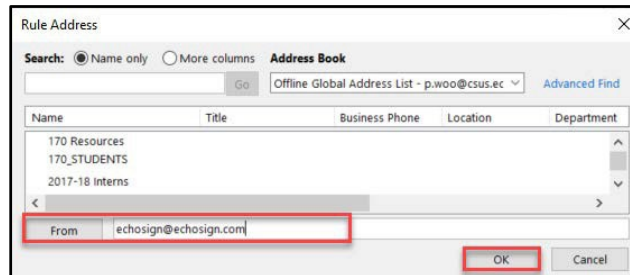
- ☒ from people or public group
- ☒ with specific words in the subject
- ☐ through the specified account
- ☐ sent only to me

Step 2: Edit the rule description (click an underlined value)

Apply this rule after the message arrives
from people or public group
and with specific words in the subject
move it to the specified folder
and stop processing more rules

Cancel < Back **Next >** Finish

- (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

Search: ☒ Name only ☐ More columns Address Book

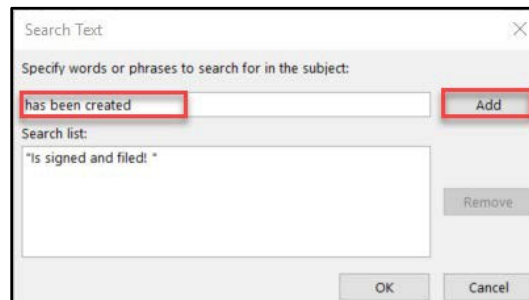
Go Offline Global Address List - p.jwoo@csus.ec Advanced Find

Name	Title	Business Phone	Location	Department
170 Resources				
170_STUDENTS				
2017-18 Interns				

From echosign@echosign.com

OK Cancel

- (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:

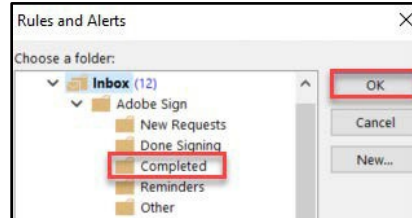
"Is signed and filed: *

Remove

OK Cancel

(iii) Click **specified folder**

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



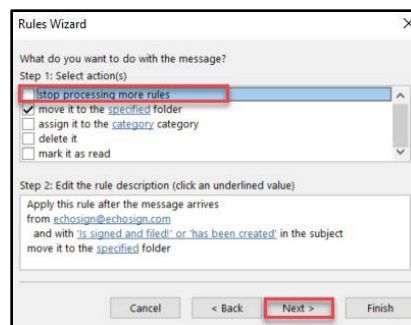
(iv) Click **Next**

(c) In the next *Rules Wizard* screen

(i) Navigate to *Step 1: Select Actions*

1. Uncheck **stop processing more rules**

(ii) Click **Next**

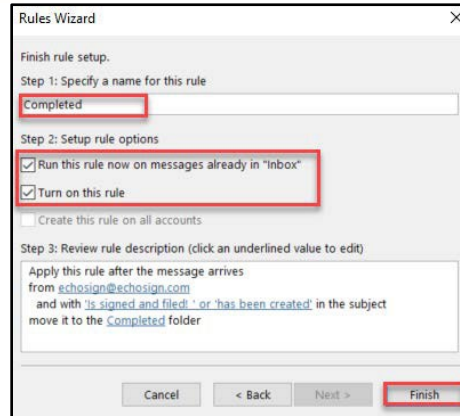


(d) In the next *Rules Wizard* screen

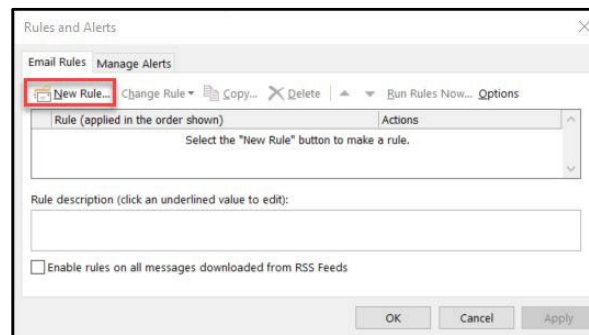
- (i) No actions needed for this screen
- (ii) Click **Next**

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

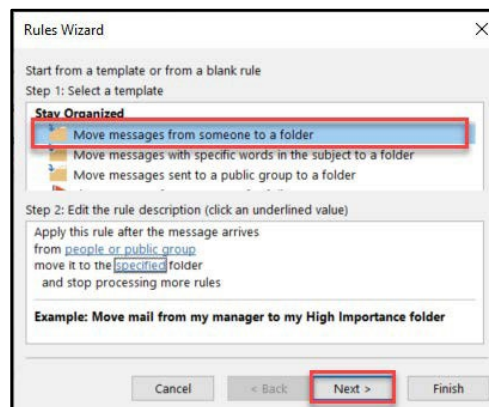
- (i) Navigate to *Step 1: Specify a name for this rule*
 1. Remove the auto default name and type **Done Signing**
- (ii) Navigate to *Step 2: Setup rule options*
 1. Select **Run this rule now on messages already in inbox**
 2. Ensure that **turn on this rule** is selected
- (iii) Click **Finish**



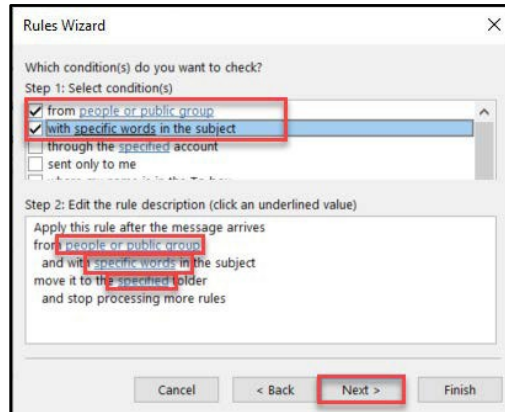
5. Create a rule for the *Reminders* sub-folder
 - a. In the *Rules and Alerts* window, Click **New Rules**



- 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



Rules Wizard

Which condition(s) do you want to check?

Step 1: Select condition(s)

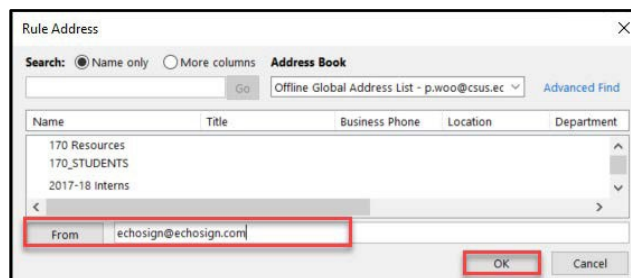
- ☒ from people or public group
- ☒ with specific words in the subject
- ☐ through the specified account
- ☐ sent only to me

Step 2: Edit the rule description (click an underlined value)

Apply this rule after the message arrives
from people or public group
and with specific words in the subject
move it to the specified folder
and stop processing more rules

Cancel < Back **Next >** Finish

- (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: ☒ Name only ☐ More columns Address Book

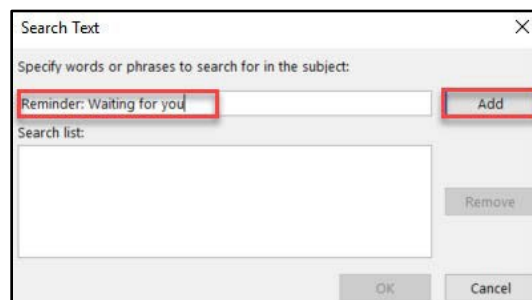
Offline Global Address List - p.woo@csus.ec Advanced Find

Name	Title	Business Phone	Location	Department
170 Resources				
170_STUDENTS				
2017-18 Interns				

From echosign@echosign.com

OK Cancel

- (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

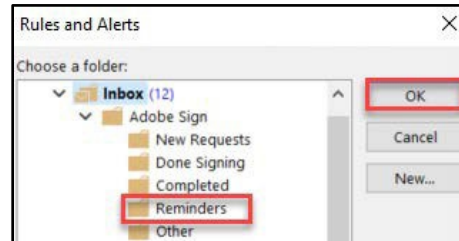
Search list:

Remove

OK Cancel

(iii) Click **specified folder**

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



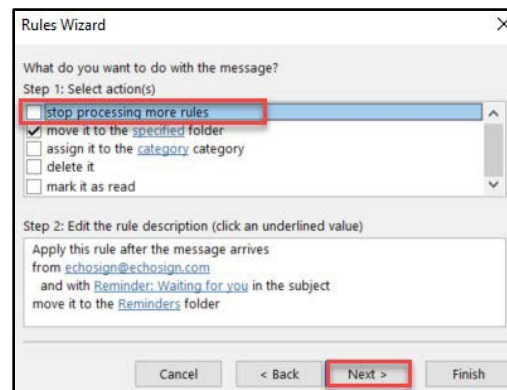
(iv) Click **Next**

(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

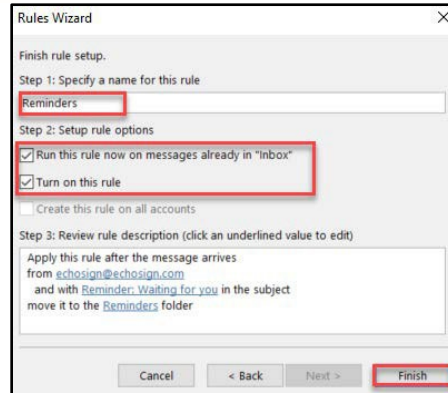
(i) Navigate to *Step 1: Specify a name for this rule*

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**



Rules Wizard

Finish rule setup.

Step 1: Specify a name for this rule

Reminders

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 echoign@echoign.com and with Reminder: Waiting for you in the subject move it to the Reminders folder

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.