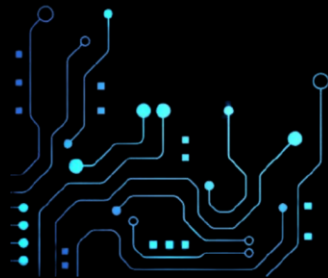


# Creating Email Filters/Rules in Gmail and Outlook

**D-LLOYD AGENCIES**



# Gmail and Outlook

- Gmail – Google based email service
- Outlook – Microsoft based email service
- Most companies use one of these 2 email giants
- You can create rules to sort emails into folders/filters for decluttering and improved email management

# Outlook (Web) Email Rules: Step 1

The screenshot shows the Outlook (Web) interface. At the top, there are tabs for 'Home', 'View', and 'Help'. Below these is a toolbar with various actions like 'New mail', 'Delete', 'Archive', 'Report', 'Sweep', 'Move to', 'Reply', 'Mark all as read', and a 'More' menu icon. A blue banner below the toolbar says 'Outlook recommends Microsoft Edge to view your mail. Try now'. The main area shows the 'Focused' tab selected, with a list of emails. On the right side, the 'More' menu is open, showing options like 'Move & delete', 'Block', 'Rules', 'Customize', 'Create rule', and 'Manage rules'. A red circle labeled '1' highlights the 'Rules' option, and a second red circle labeled '2' highlights the 'Manage rules' option in the submenu.

Home View Help

New mail Delete Archive Report Sweep Move to Reply Mark all as read

Outlook recommends Microsoft Edge to view your mail. Try now

Focused Other

From	Subject	Received
Outlook Team	Welcome to your new Outlook.com inbox Thanks for being one of the first users of our next-ge...	5/23/2013
Hotmail Member Services	Getting started with your mail account Here are some tips to get you started: * Import your con...	3/9/2013

Move & delete 1

Block

Rules 2

Create rule

Customize Manage rules

It looks like you using an ad blo

# Outlook (Web) Email Rules: Step 2

Settings

Search settings

General

**Mail**

Calendar

People

View quick settings

Layout

Compose and reply

Attachments

**Rules**

Sweep

Junk email

Customize actions

Sync email

Message handling

Rules

You can create rules that tell Outlook how to handle incoming email messages. You choose both the conditions that trigger a rule and the actions the rule will take. Rules will run in the order shown in the list below, starting with the rule at the top.

+ Add new rule

You haven't created any rules yet.

# Outlook (Web) Email Rules: Step 3

Name and create your email rule.

You can forward messages, move them to folders, and more!

## Rules

×

1

Enter a name.

2

Add a condition

3

Add an action

[Add an exception](#)

☒ Stop processing more rules ⓘ

# Outlook (Web) Email Rules: Example

Example: Any email where the message body contains the word “unsubscribe” gets moved to the Newsletters folder.

Rules

1

Newletters

✓

Add a condition

Message body includes

unsubscribe

Add another condition

✓

Add an action

Move to

Newsletters

Add another action

Add an exception

✓

Stop processing more rules

✓

Run rule now

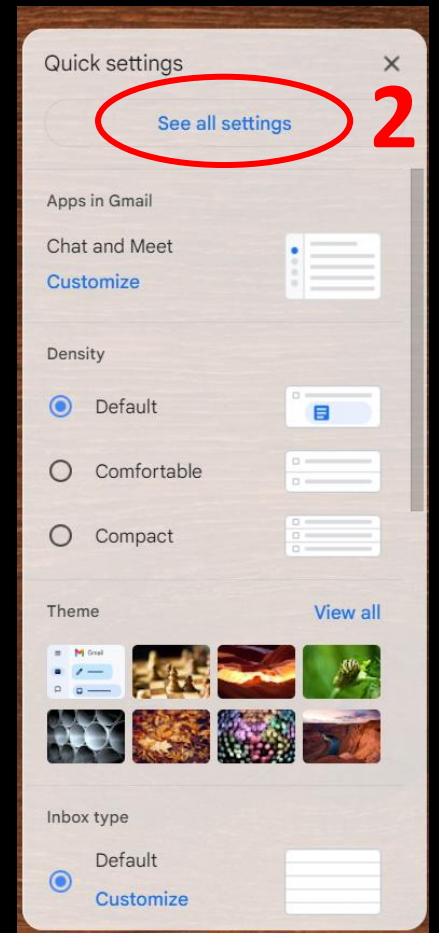
Save

Discard

# Gmail Rules: Step 1



Top Secret Emails Here




# Gmail Rules: Step 2

## Settings

[General](#) [Labels](#) [Inbox](#) [Accounts and Import](#) [Filters and Blocked Addresses](#) [Forwarding and POP/IMAP](#) [Add-ons](#) [Chat and Meet](#) [Advanced](#) [Offline](#) [Themes](#)

Language:

Gmail display language: English (US) 


[Change language settings for other Google products](#)

☒ Enable input tools - Use various text input tools to type in the language of your choice - [Edit tools](#) - [Learn more](#)


☒ Right-to-left editing support off

☐ Right-to-left editing support on

Phone numbers:


Default country code: United States 

Maximum page size:

Show 50 

 conversations per page

Undo Send:

Send cancellation period: 5 

 seconds

Default reply behavior:

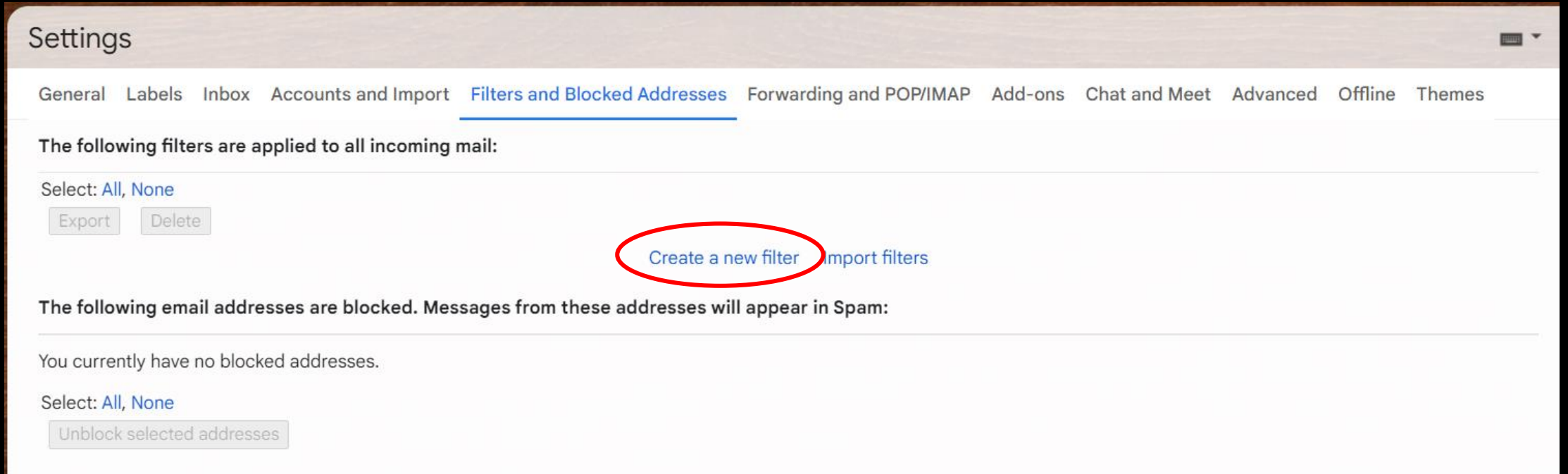
☐ Reply

☐ Reply all

[Learn more](#)



# Gmail Rules: Step 3



The screenshot shows the Gmail 'Settings' page with the 'Filters and Blocked Addresses' tab selected. The page is divided into two main sections. The first section, 'The following filters are applied to all incoming mail:', includes a 'Select: All, None' dropdown, 'Export' and 'Delete' buttons, and a red circle highlighting the 'Create a new filter' link next to the 'Import filters' link. The second section, 'The following email addresses are blocked. Messages from these addresses will appear in Spam:', states 'You currently have no blocked addresses.' and includes a 'Select: All, None' dropdown and an 'Unblock selected addresses' button.

Settings

General Labels Inbox Accounts and Import Filters and Blocked Addresses Forwarding and POP/IMAP Add-ons Chat and Meet Advanced Offline Themes

The following filters are applied to all incoming mail:

Select: [All](#), [None](#)

[Export](#) [Delete](#)

[Create a new filter](#) [Import filters](#)

The following email addresses are blocked. Messages from these addresses will appear in Spam:

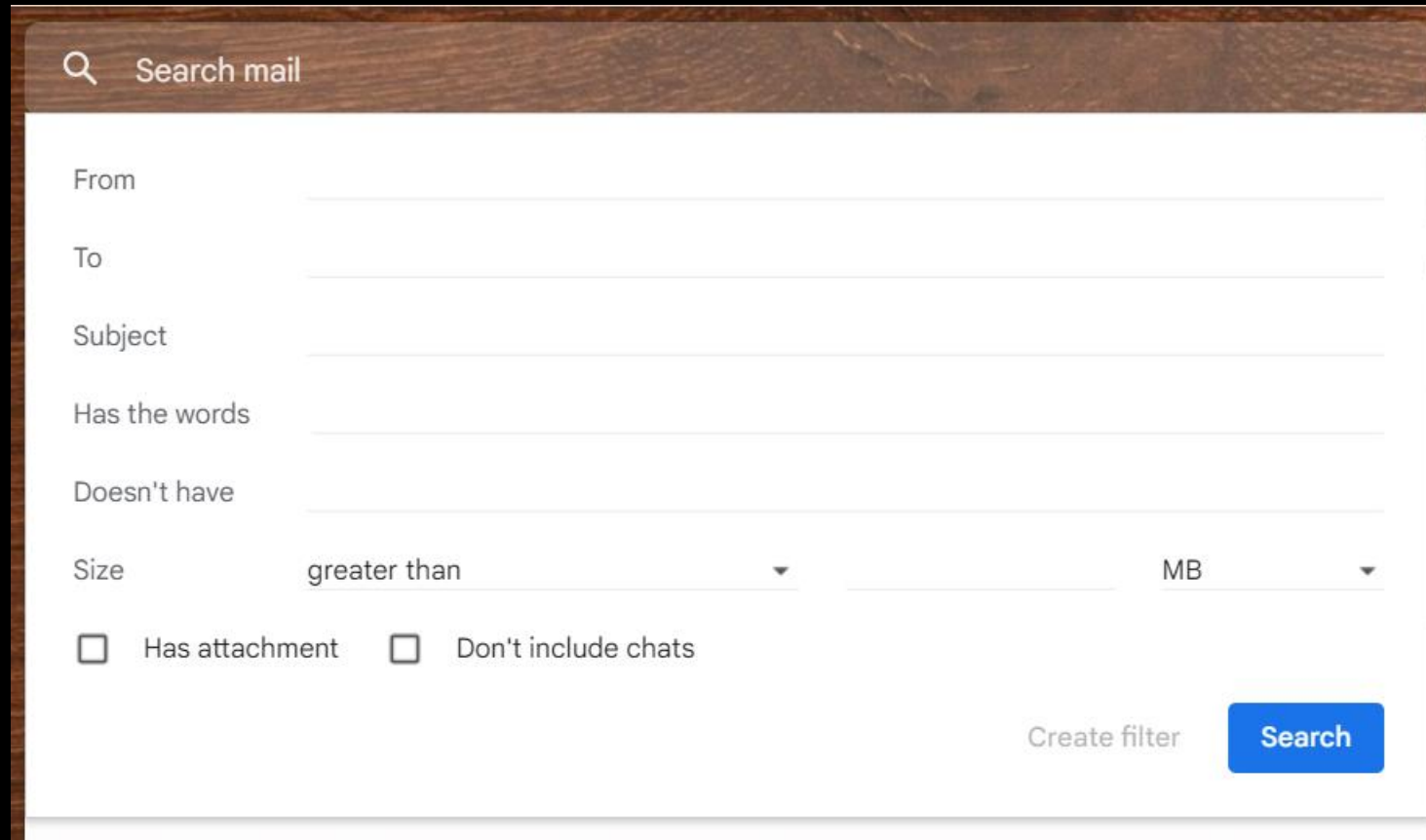
You currently have no blocked addresses.

Select: [All](#), [None](#)

[Unblock selected addresses](#)

# Gmail Rules: Step 4

Use Gmail built in search functions to find emails to apply to the new filter.  
This is the “condition” part from Outlook



The screenshot shows the Gmail search filter creation interface. At the top, there is a search bar with a magnifying glass icon and the text "Search mail". Below this, there are several input fields for defining search criteria:

- From:** A text input field.
- To:** A text input field.
- Subject:** A text input field.
- Has the words:** A text input field.
- Doesn't have:** A text input field.
- Size:** A dropdown menu showing "greater than" and a text input field for a value, followed by a unit dropdown menu showing "MB".

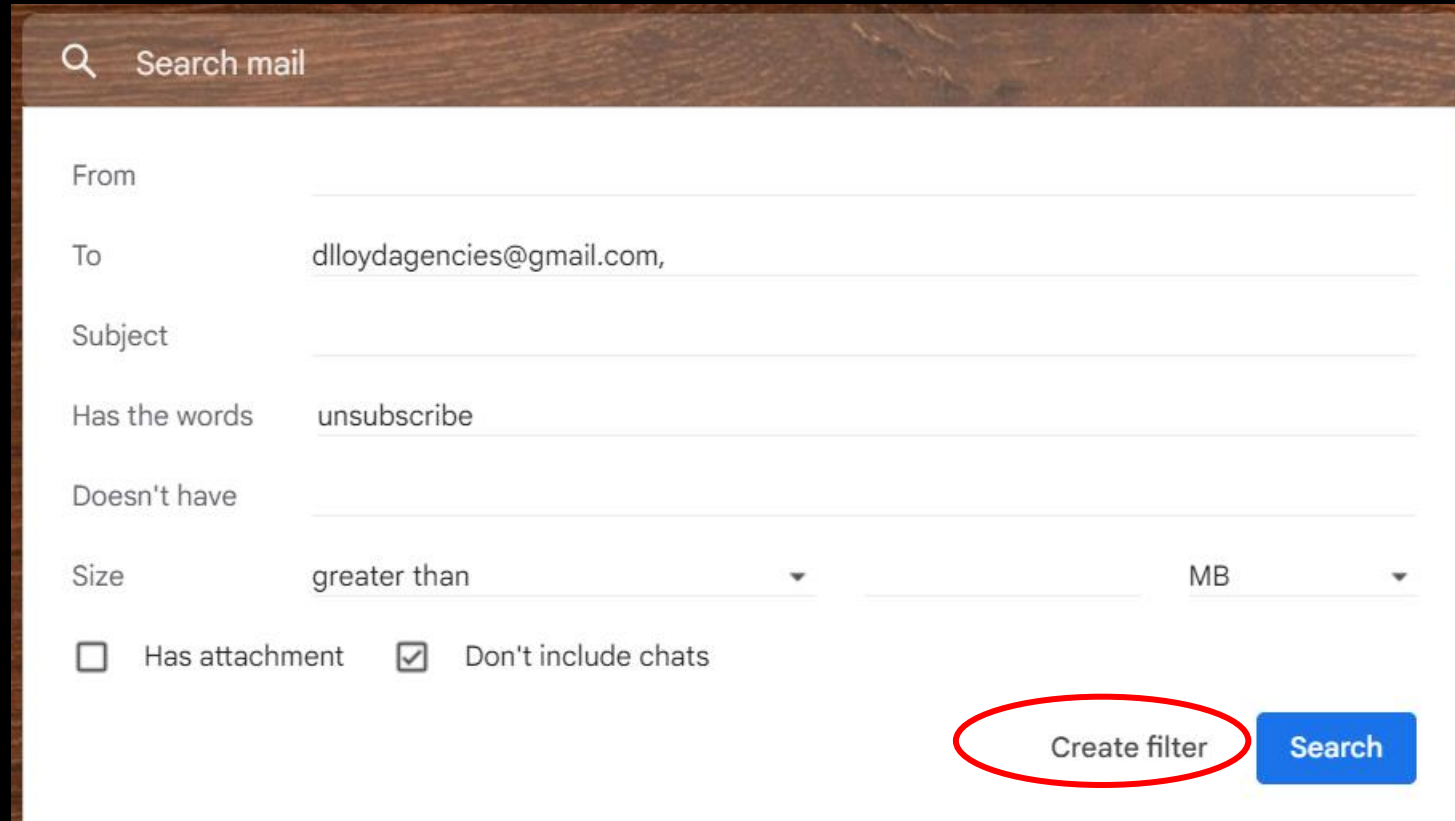
Below these fields, there are two checkboxes:

- ☐ Has attachment
- ☐ Don't include chats

At the bottom right, there are two buttons: "Create filter" and "Search".

# Gmail Rules: Example


Same Example: Any email where the message body contains the word “unsubscribe” gets moved to the Newsletter filter.



The screenshot shows the Gmail 'Create filter' dialog box. At the top is a search bar with a magnifying glass icon and the text 'Search mail'. Below this are several input fields for filter criteria: 'From', 'To' (containing 'dlloydagencies@gmail.com,'), 'Subject', 'Has the words' (containing 'unsubscribe'), 'Doesn't have', and 'Size' (with a dropdown menu showing 'greater than' and a unit dropdown showing 'MB'). At the bottom left, there are two checkboxes: 'Has attachment' (unchecked) and 'Don't include chats' (checked). At the bottom right, there are two buttons: 'Create filter' (highlighted with a red oval) and 'Search' (a blue button).

# Gmail Rules: Step 5

You can now decide the “action” that Gmail will take.

 When a message is an exact match for your search criteria:

☐

 Skip the Inbox (Archive it)

☐

 Mark as read

☐

 Star it

☐

 Apply the label: 

Choose label... ▼

☐

 Forward it to: 

Choose an address... ▼

[Add forwarding address](#)

☐

 Delete it

☐

 Never send it to Spam

☐

 Always mark it as important

☐

 Never mark it as important

☐

 Categorize as: 

Choose category... ▼

☐

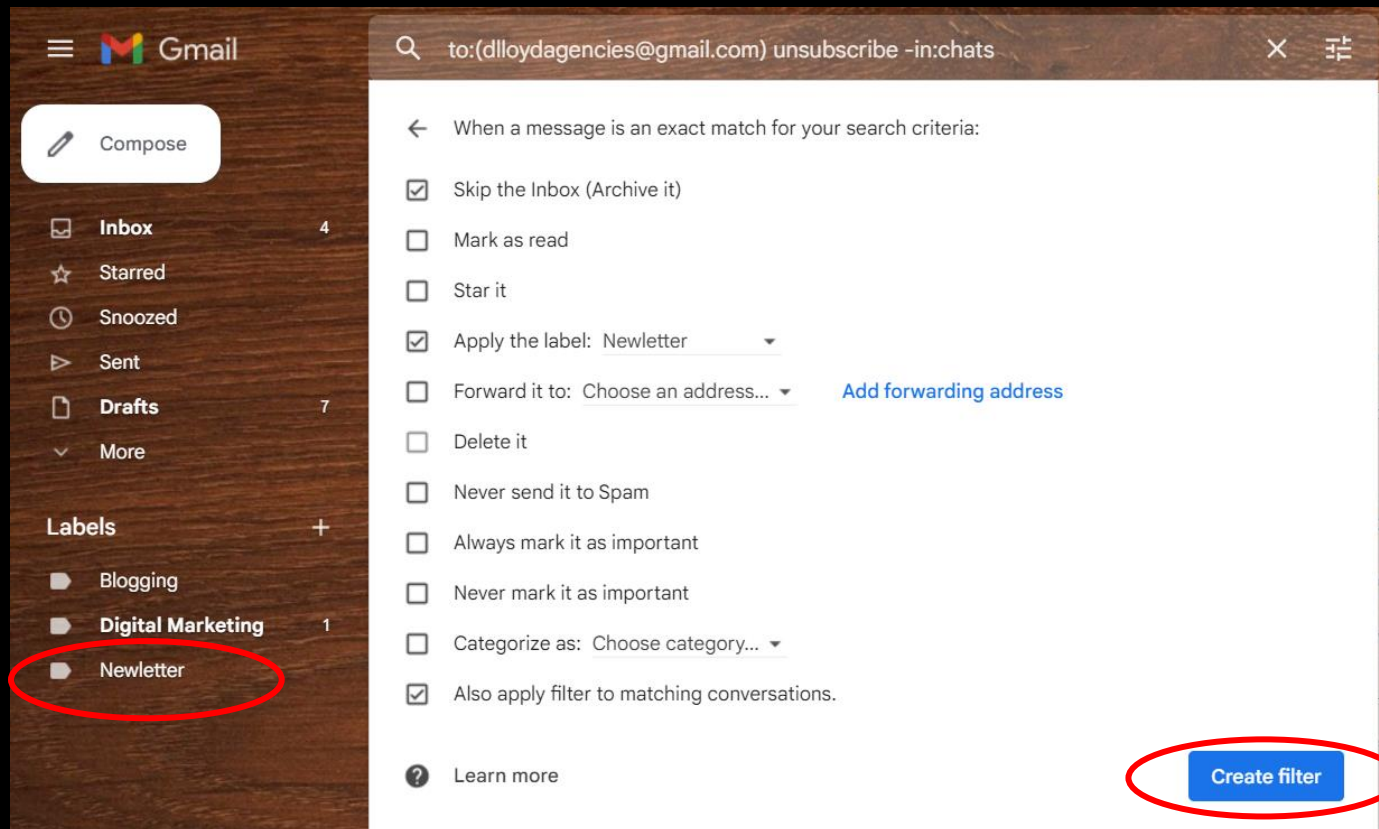
 Also apply filter to matching conversations.

 Learn more

Create filter

# Gmail Rules: Example

Same Example: Any email where the message body contains the word “unsubscribe” gets moved to the Newsletter filter



## Note:

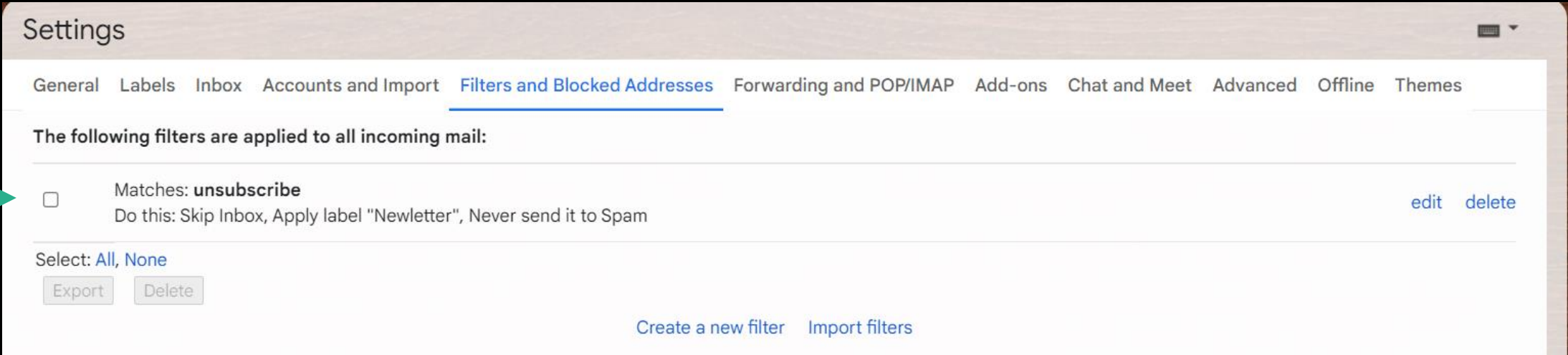
To exactly match Outlook's email folders, make sure “Skip the Inbox” is checked when applying Gmail labels.

## Else:

A duplicate email will be stored in the inbox and the labels

# Gmail Rules

Your filter has been created in Gmail settings



The screenshot shows the Gmail 'Settings' page with the 'Filters and Blocked Addresses' tab selected. A green arrow points to a checkbox next to a filter rule. The filter rule is titled 'Matches: unsubscribe' and has the action 'Do this: Skip Inbox, Apply label "Newsletter", Never send it to Spam'. The filter is currently unchecked. Below the filter list, there are links for 'Select: All, None', 'Export', and 'Delete'. At the bottom, there are links for 'Create a new filter' and 'Import filters'.

Settings

General Labels Inbox Accounts and Import Filters and Blocked Addresses Forwarding and POP/IMAP Add-ons Chat and Meet Advanced Offline Themes

The following filters are applied to all incoming mail:

☐ Matches: **unsubscribe**  
Do this: Skip Inbox, Apply label "Newsletter", Never send it to Spam [edit](#) [delete](#)

Select: [All](#), [None](#)

[Export](#) [Delete](#)

[Create a new filter](#) [Import filters](#)