

# Your Gmail Filter Reference Guide: The Dual-Label System

This guide explains your workflow for managing vendor emails in Gmail, designed to work alongside ClickUp.

## I. The Philosophy: A Filing Cabinet, Not a To-Do List

- **ClickUp** is your "To-Do List." It tells you what actions to take.
- **Gmail** is your "Filing Cabinet." It is a searchable archive of the documents and communications related to your tasks.

Your goal is to get emails *out* of your inbox and into the correct, organized files automatically, so you can focus on your tasks in ClickUp.

## II. The Components: Two Label Types

Your system is built on two parallel sets of labels. Every email will get **at least one** label from **each** category.

### 1. Function Labels (The "What")

These are your main "drawers." They answer the question, "**What is this email about?**"

```
▼ Purchasing
  Quotes
  Requisitions
  POs
  Order-Notifications
  Invoices
```

### 2. Vendor Labels (The "Who")

These are your "file folders." They answer the question, "**Who is this email from?**"

```
V-Dell
V-Cisco
V-Microsoft
V-VMware
...
```

## III. The Core Rule: Two Filters for Every Rule

To get one email to have *two* labels (e.g., `Purchasing/Quotes` and `V-Dell` ), you must create **two separate filters** with **identical criteria**.

This is the most important part of the entire system.

#### IV. How to Add Filters in the Future (Your 5-Step Process)

Use this step-by-step process every time you need to automate a new type of email.

**Step 1: Identify the Email** Find a new email you want to automate.

- **Example:** A new shipping notification from Cisco.

**Step 2: Mentally Assign Its Labels**

- **What is it?** It's an order notification. The **Function Label** is `Purchasing/Order-Notifications` .
- **Who is it from?** It's from Cisco. The **Vendor Label** is `V-Cisco` .

**Step 3: Find the Trigger** Look at the email and find a unique, consistent pattern.

- **Example Trigger:** `from:(shipping@cisco.com) AND subject:("Shipping Confirmation")`

**Step 4: Create Filter #1 (The Function Filter)**

1. Go to `Settings > See all settings > Filters and Blocked Addresses` .
2. Click `Create a new filter` .
3. In the `Has the words` field, paste your trigger: `from:(shipping@cisco.com) AND subject:("Shipping Confirmation")`
4. Click `Create filter` .
5. Check these boxes:
  - `Skip the Inbox (Archive it)`
  - `Apply the label: Purchasing/Order-Notifications`
6. Click `Create filter` .

**Step 5: Create Filter #2 (The Vendor Filter)**

1. Click `Create a new filter (yes, again)`.
2. In the `Has the words` field, paste the **exact same trigger**: `from:(shipping@cisco.com) AND subject:("Shipping Confirmation")`
3. Click `Create filter` .
4. Check these boxes:
  - `Skip the Inbox (Archive it) (Yes, check this again.)`
  - `Apply the label: V-Cisco`
5. Click `Create filter` .

#### V. The Payoff: Why This System Works

By following this "two-filter" rule, you create a powerful, flexible system.

- **Want to see ALL order notifications?**

- Click the `Purchasing/Order-Notifications` label. You will see a list of emails from Dell, Cisco, and everyone else.
- **Want to see ALL communication from Cisco?**
  - Click the `V-Cisco` label. You will see quotes, POs, and order notifications—only for Cisco.
- **Want to see your to-do list?**
  - You open **ClickUp**. Your Gmail inbox remains at zero.