

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.