

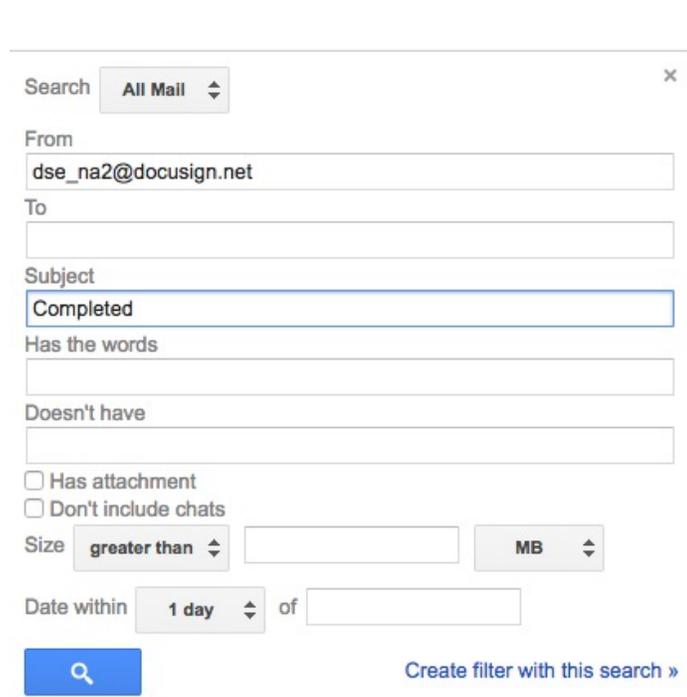
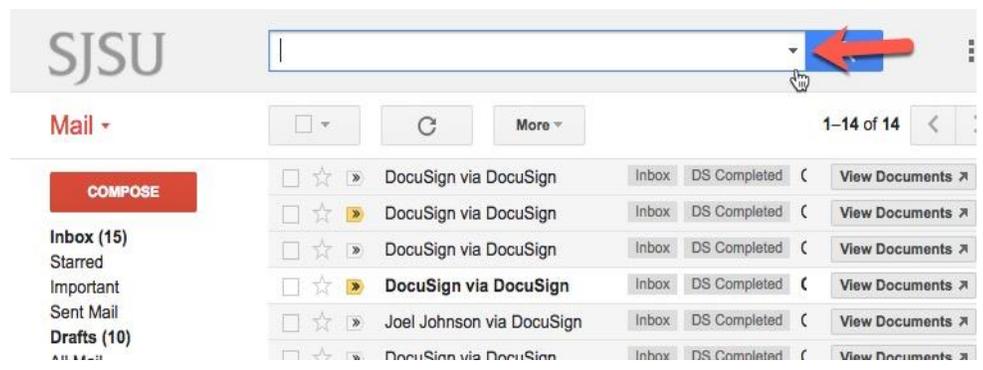
DocuSign: Create rules to filter your emails

You can manage your DocuSign Completed email using Gmail's filters to send your completed document to a folder like "DocuSign: Completed". This feature allows you to store all DocuSign completed document in Gmail for search and retrieval.

This document covers 1) create a filter, 2) Edit or delete filters, 3) Export or Import filters.

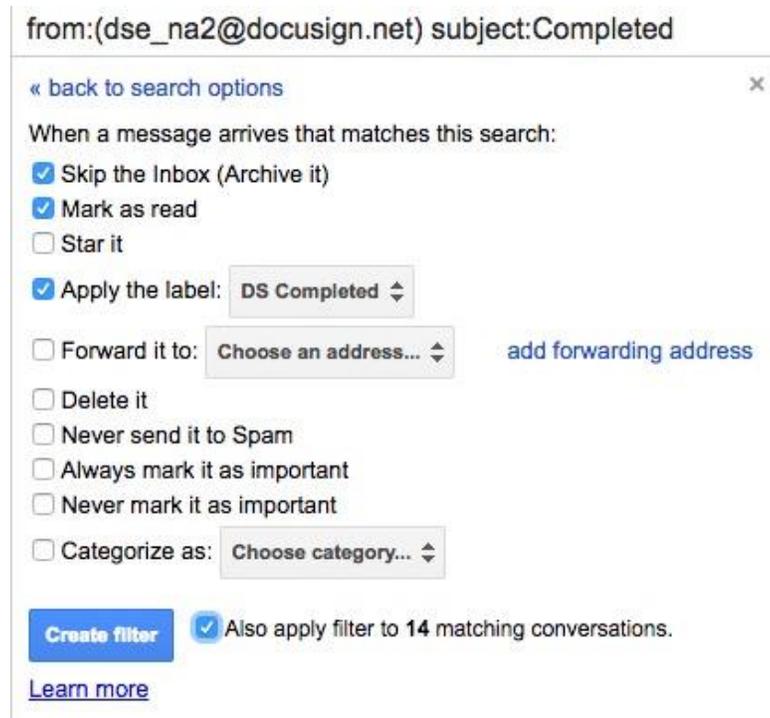
Create a filter

1. Open Gmail
2. In the search box at the top, click the Down arrow 
3. Enter your search criteria. If you want to check your search worked correctly, see what emails show up by clicking Search 
4. At the 'From', type in dse_na2@docusign.net
5. At the 'Subject', type in **Completed**
6. At the bottom right, click on 'Create filter with this search'



Choose what you'd like the filter to do.

7. Suggest to select the following items on the list:
 - A. Skip the Inbox (Archive it)
 - B. Mark as read
 - C. Apply the label: **DS Completed**. Note. If you don't already have the label DS Completed, you need to create a new label.
 - D. Also apply filter to xxx matching conversation.
8. Click **Create Filter**
9. Your filter is now created. This filter is set to archive, mark as read, and apply the email to the label(folder) when an email from dse_na2@docusign.net with the subject: Completed.



The screenshot shows the Gmail filter creation interface. At the top, it displays the search criteria: "from:(dse_na2@docusign.net) subject:Completed". Below this, there is a "back to search options" link and a close button. The main section is titled "When a message arrives that matches this search:" and contains several options with checkboxes: "Skip the Inbox (Archive it)" (checked), "Mark as read" (checked), "Star it" (unchecked), "Apply the label:" (checked) with a dropdown menu showing "DS Completed", "Forward it to:" (unchecked) with a dropdown menu showing "Choose an address..." and a link "add forwarding address", "Delete it" (unchecked), "Never send it to Spam" (unchecked), "Always mark it as important" (unchecked), "Never mark it as important" (unchecked), and "Categorize as:" (unchecked) with a dropdown menu showing "Choose category...". At the bottom, there is a blue "Create filter" button, a checked checkbox "Also apply filter to 14 matching conversations.", and a "Learn more" link.

Edit or Delete Filters

Instructions on how to edit or delete filters.

1. Open **Gmail**
2. At the top right, click **Settings**
3. Click **Settings**
4. Click **Filters and Blocked Addresses**
5. Find the filter you'd like to change
6. Click **edit** or **delete** to remove the filter. If you're editing the filter, click **Continue** when you're done editing.
7. Click **Update Filter**

(note: you can create as many filters as you like, but only 20 filters can forward to other addresses.)

Export or Import Filters

Instructions on how to export or import filters.

If you're a filter pro and have a great filter system that you want to use in another account or share with a coworker, you can export and import filters.

1. Open **Gmail**
2. At the top right, click on **Settings**
3. Click **Settings**
4. Click **Filters and Blocked Addresses**
5. Check the box next to the filter.

Export a filter

1. At the bottom of the page, click **Export**
2. This will give you a .xml file, which you can edit in a text editor if you'd like.

Import a filter

1. At the bottom of the page, click **Import filters**
2. Choose the file with the filter you'd like to import
3. Click **Open file**
4. Click **Create filters**