



## EMAIL AUTOMATION · RULES

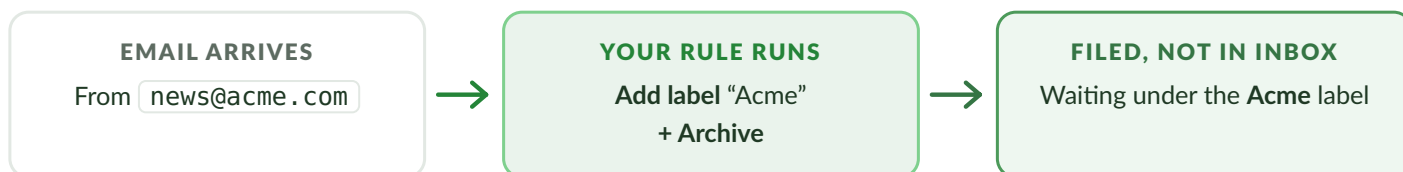
# Organizing Incoming Mail with Rules

Put rules and labels together so your mail arrives **already sorted**. Instead of a crowded inbox, new messages land under the right label — and a glance at your label list tells you exactly what's new.



## The idea: label it and tuck it away

In the **Basics** guide you learned that a rule is **conditions** in, **actions** out. For staying organized, two actions do almost all the work: **Add label** (tag the message so it belongs to a topic) and **Archive (remove Inbox label)** (take it out of the Inbox). Together they mean a message is filed the moment it arrives — you never touch it, yet it's exactly where you'd look for it.



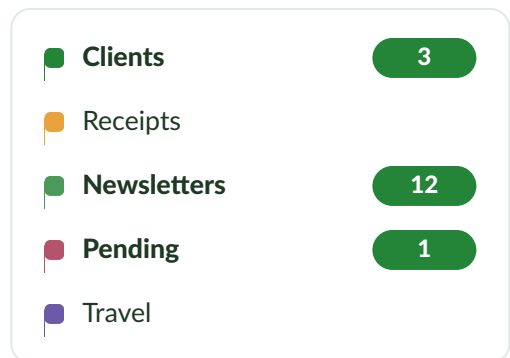
### Make the label first.

A rule can only add a label that already exists, so create your labels before you build the rule. See the **Why Labels Beat Folders** guide if you need a refresher.



## The payoff: your labels become your to-do list

Because filed mail is archived out of the Inbox but still **unread**, each label shows a count of how many new messages it's holding. Instead of scanning one long inbox, you scan your label list and see at a glance **which topics have something new** — and which you can ignore for now.



Mailbox overview showing labels and counts:

- Clients: 3
- Receipts
- Newsletters: 12
- Pending: 1
- Travel

A glance tells you Clients, Newsletters, and Pending have new mail; Receipts and Travel are quiet.

## Quick Steps: Build an Organizing Rule

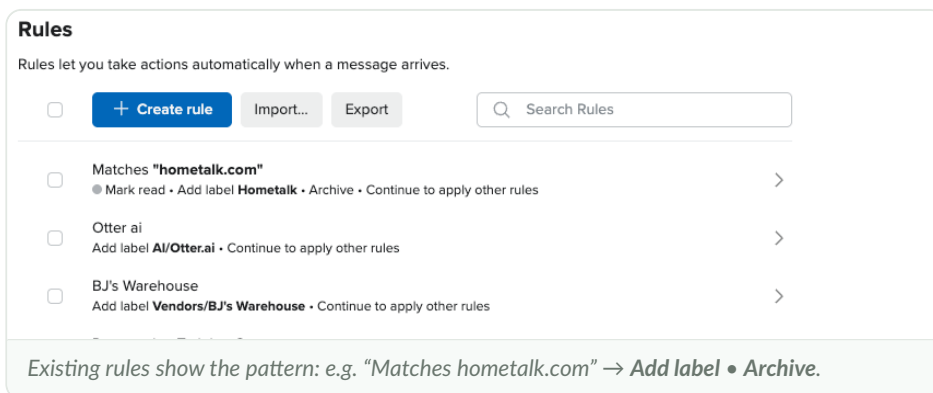


- 1 Create the **label** first (if it doesn't exist yet).
- 2 Open **Settings › Filters & Rules** and click **+ Create rule**.
- 3 Set the **condition** — usually **From** the sender you want to file — then **Continue**.
- 4 Tick **Add label** and choose your label; also tick **Archive (remove Inbox label)** so it skips the Inbox.
- 5 Set **Apply to...**, give it a **Name**, and click **Do it**.

## Illustrated Walkthrough

### 1 Start a new rule

In **Settings › Filters & Rules**, click **+ Create rule**. The rules you already have are listed here — notice how the examples already do exactly what we're building: **Add label** and **Archive**.



**Rules**

Rules let you take actions automatically when a message arrives.

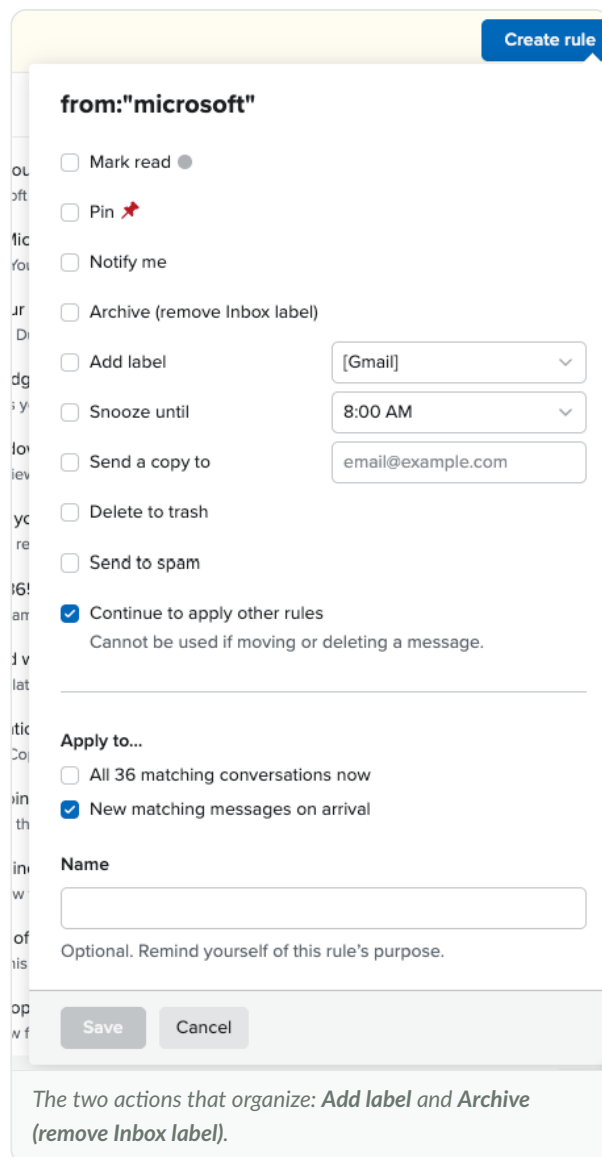
☐ **+ Create rule** **Import...** **Export**

|                          |                                                                                   |   |
|--------------------------|-----------------------------------------------------------------------------------|---|
| <input type="checkbox"/> | Matches "hometalk.com"                                                            | > |
|                          | ● Mark read • Add label <b>Hometalk</b> • Archive • Continue to apply other rules |   |
| <input type="checkbox"/> | Otter.ai                                                                          | > |
|                          | Add label <b>AI/Otter.ai</b> • Continue to apply other rules                      |   |
| <input type="checkbox"/> | BJ's Warehouse                                                                    | > |
|                          | Add label <b>Vendors/BJ's Warehouse</b> • Continue to apply other rules           |   |

Existing rules show the pattern: e.g. "Matches hometalk.com" → **Add label** • **Archive**.

## 2 Pick the two organizing actions

After setting your **From** condition and clicking Continue, tick **Add label** and choose the label from the dropdown. Then tick **Archive (remove Inbox label)** so the message is filed straight away instead of sitting in your Inbox.



**from:"microsoft"**

- ☐ Mark read
- ☐ Pin
- ☐ Notify me
- ☐ Archive (remove Inbox label)
- ☐ Add label [Gmail]
- ☐ Snooze until 8:00 AM
- ☐ Send a copy to email@example.com
- ☐ Delete to trash
- ☐ Send to spam
- ☒ Continue to apply other rules  
Cannot be used if moving or deleting a message.

**Apply to...**

- ☐ All 36 matching conversations now
- ☒ New matching messages on arrival

**Name**

Optional. Remind yourself of this rule's purpose.

**Save** **Cancel**

The two actions that organize: **Add label** and **Archive (remove Inbox label)**.

### ! Keep "Continue to apply other rules" ticked.

Adding a label and archiving doesn't delete the message, so leave this on. That lets a later rule add a *second* label too — remember, one message can wear several.

## 3

## Name it and apply it

Under **Apply to...**, tick **All matching conversations now** to sweep existing mail into the label, and keep **New matching messages on arrival** for everything going forward. Name the rule after the label so it's easy to find, then click **Do it**.

**Create rule**

**from:"microsoft"**

☐ Mark read ●

☐ Pin 📌

☐ Notify me

☐ Archive (remove Inbox label)

☒ Add label Microsoft ▼

☐ Snooze until 8:00 AM ▼

☐ Send a copy to email@example.com

☐ Delete to trash

☐ Send to spam

☒ Continue to apply other rules  
Cannot be used if moving or deleting a message.

**Apply to...**

☒ All 36 matching conversations now

☒ New matching messages on arrival

**Name**

Microsoft

Optional. Remind yourself of this rule's purpose.

**Do it** **Cancel**

*A finished organizing rule: Add label "Microsoft", applied to existing and new mail.*

## 4 Repeat for your main senders — then relax

Add one rule per sender or topic you care about. After a few, the bulk of your routine mail files itself: newsletters, receipts, project threads, and so on each land under their label, leaving your Inbox for things that genuinely need you.

### ➤ Working on a team?

If the label is **shared**, your organizing rule fills a shared label everyone can see — so a teammate can pick up where you left off. See **Organizing & Sharing Labels with Your Team**.

### ➤ Next: clearing out the junk.

The same rule engine can quietly delete mail you never want to see. See **Taming Junk Mail with Rules**.



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