

SETTING UP EMAIL FILTERS



Click the  at the top of your inbox.

A screenshot of the email filter creation form. The form has several fields: "From", "To", "Subject" (with the text "SAF - FY23 Monthly Student Activity Fund Checklist"), "Has the words", "Doesn't have", "Size" (with a dropdown menu set to "greater than" and "MB"), "Date within" (with a dropdown menu set to "1 day" and a calendar icon), "Search" (with a dropdown menu set to "All Mail"), and a checkbox for "Has attachment". At the bottom right, there are two buttons: "Create filter" and "Search". Red arrows point from the "From" field, the "Subject" field, and the "Create filter" button to the text below.

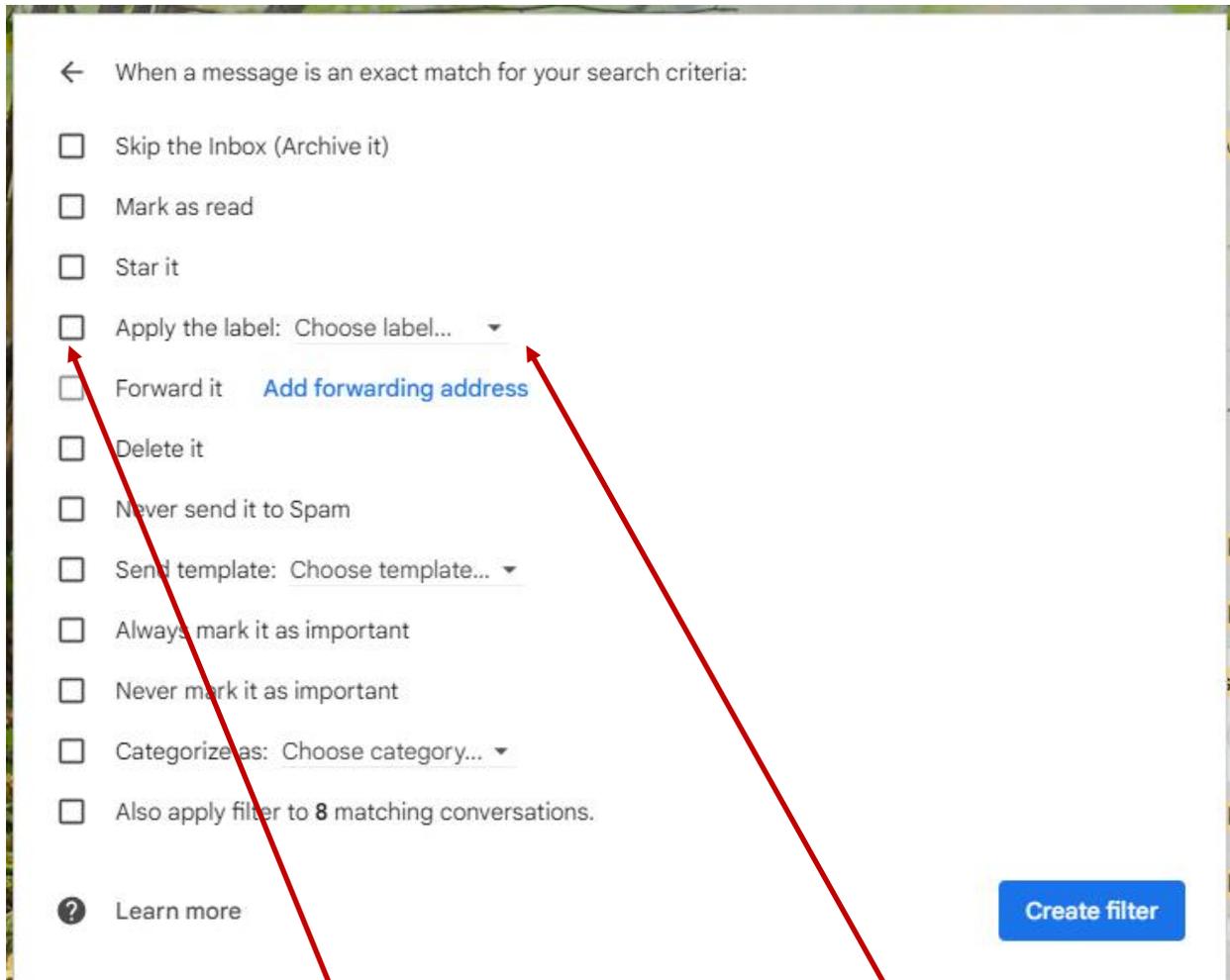
Enter 'Key Words' in the subject line from the form (s) you wish to capture.

Tip: If you receive several different types of forms, you may want to create a filter on the 'From' Field or create a filter for each type of form filtering them to a separate folder. I suggest a folder for the preparers to capture all forms that are fully approved.

If creating the filter based on the 'From' field, use 'OKCPS Finance' for your key words.

After entering your 'Key Words', Click the 'Create Filter' option.

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Creating Filter:

Use the 'Apply the Label' option. Click the down arrow next to the 'Choose label'

- Select the folder you want to route your forms to or choose the create option to create a new folder.
- All emails coming into your inbox that match your filter will be routed to the folder you've selected.
- Opening that folder or folders daily will allow you to open and approve forms on a consistent basis and end the annoying search for forms.
- If you need assistance with setting these up, please let me know.