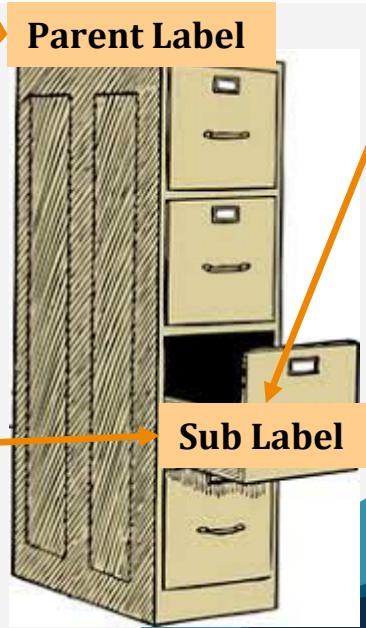
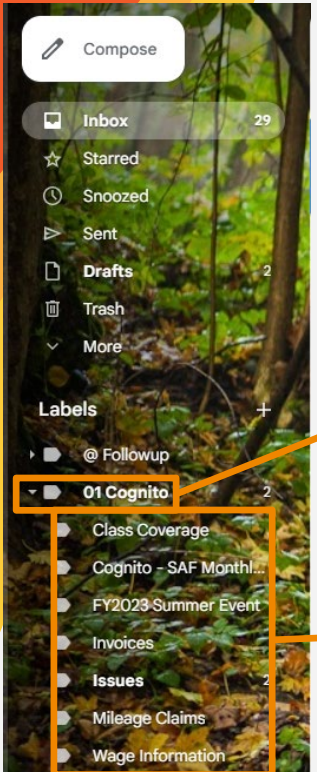




Filtering Incoming Cognito Notifications

- Gmail allows users to set up filters; capturing & routing emails to predetermined labels.
- Gmail uses the term 'Label' for what we might consider a folder.
- The user may set up a '**Parent**' label and add as many '**Subsequent (Sub)**' labels as needed. The **Parent label is the Filing Cabinet**, the **Sub labels are the drawers in the Filing Cabinet**.



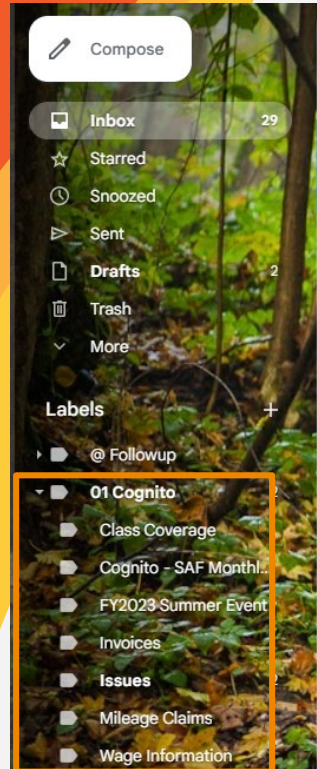
Filtering Incoming Cognito Notifications



Helpful Hints

- Gmail sorts labels in **Numeric** then **Alpha** order. Placing **01** at the beginning of the label name ensures the label will be sorted to the top of the list of labels.
- Sorting Cognito forms into Sub labels can be accomplished by identifying the words contained in the subject line of notifications. An example would be using words '**Class Coverage**' to capture incoming Class Coverage / Loss of Plan email notifications.
- **Please Note:** Sub labels are not required. Depending on your preference, it is fine to filter all notifications from Cognito into one Parent label.
- After these filters are in place, Gmail will file your forms until you are ready to review and approve; **or** final notifications of approval can be kept in a label until they are needed for reference; this process simplifies tracking down documentation.

The following slides are illustrations of the steps to set up filters. If you'd like to follow on your own laptop, open Gmail and we can begin.





Creating 'Parent' Labels

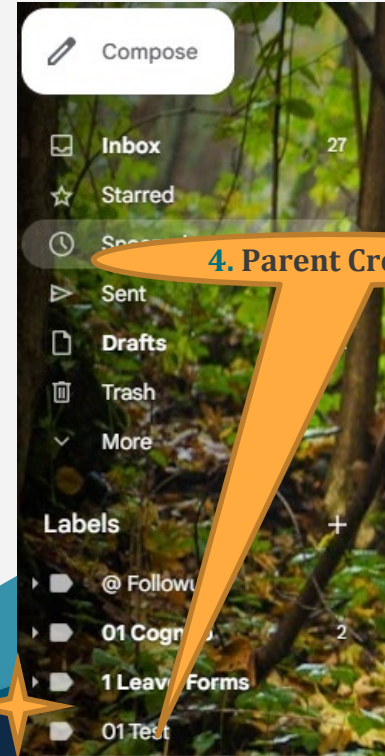
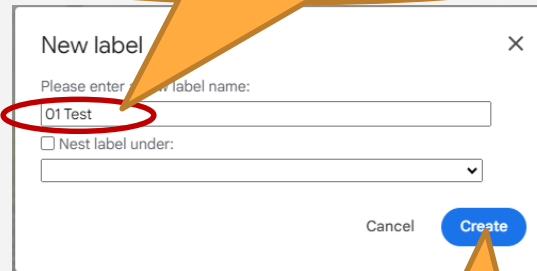
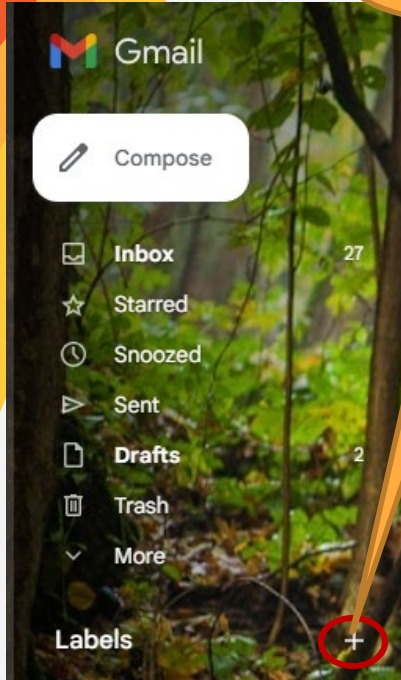
In the illustration below, I'm creating a Parent Label named '01 Test'.

1. Click the (+)

2. Type in the Parent name.

3. Click "Create"

4. Parent Created





Creating 'Sub' Labels

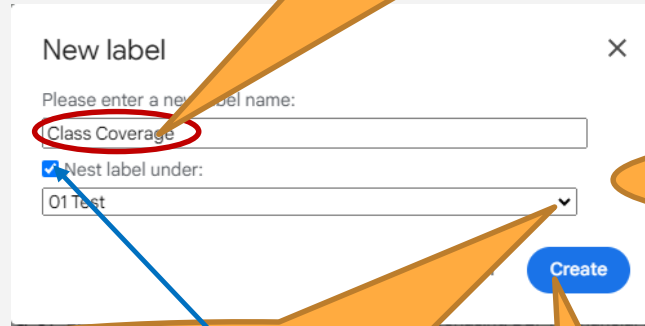
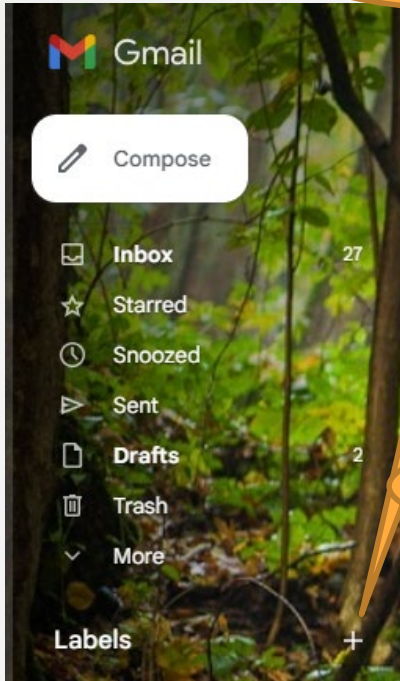
1. Click the (+)

2. Type in the Sub name.

3. Click the blue checkbox;
Then click the dropdown to select a
Parent Label name.

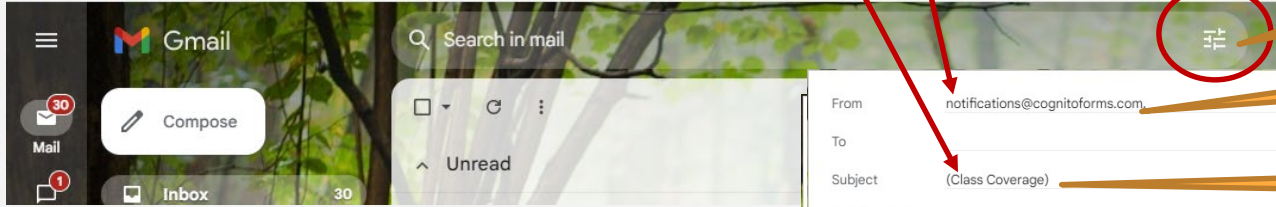
4. Click "Create"

5. Sub Label is 'Nested' under
the Parent Label.



Defining the Filter

In this step we will tell Gmail what information to look for in the incoming email notifications and what to do with them.
Let's filter 'Class Coverage' notification emails.



1. Click Here

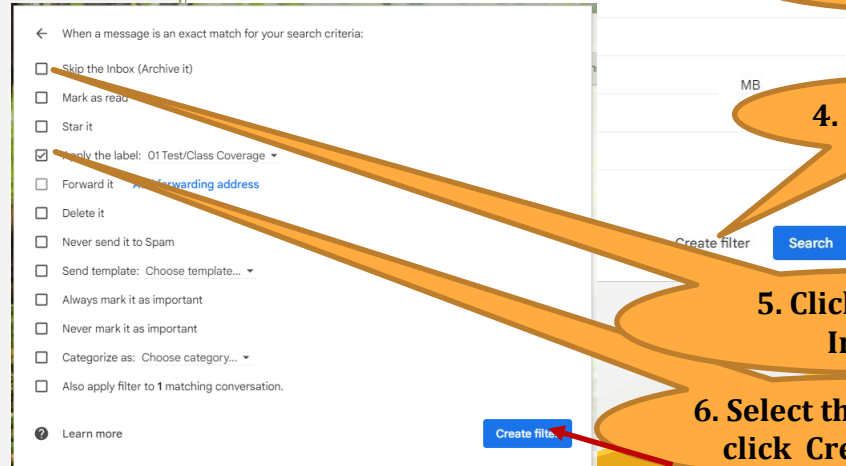
2. Email 'From'

3. Subject Line

All Cognito notifications come from:
notifications@cognitofirms.com

****We've created each of the form types to have unique subject lines identifying the type of approval / information being requested. ****

Using () when entering subject line information is helpful in capturing forms with slight text variations.



4. Create Filter

5. Click 'Skip the Inbox'

6. Select the Label and click Create Filter