



## Gmail: Create email filters

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Filters are a great way to manage similar types of messages that you always deal with the same way. For example, if you always label messages from your manager so they stand out visually in your Inbox, you can have a filter apply the label for you automatically. If you want all messages containing people's status reports to skip your Inbox and go directly to a Status Report label, a filter can do that, too.

Filters can apply any number of different actions to incoming messages, based on any combination of criteria. And the great news is, they're really easy to create! In this tip, we'll create a filter that applies a **Finance** label to all messages from your accountant that contain a budget report attachment.

### Step 1. Define which messages to filter

To begin, you need to define the messages you want to filter. You do this by selecting one or more criteria, just as if you were performing an advanced search. In fact, it's so much like creating a search, that you use the Search box to do it!

1. Click the small down arrow at the far right of the Search bar to open the Search box.
2. Select one or more criteria that define which messages to filter.
3. Click the **Create filter with this search** link.

Search

Inbox

From  
ben@cloudeasel.com

To

Subject  
budget

Has the words  
report

Doesn't have

☒ Has attachment

Date within 1 day of

Examples: Friday, today, Mar 26, 3/26/04

[Create filter with this search »](#)

About Today: Holiday Season Etiquette - If you can't s

10 broken technologies - Trouble viewing this mail? Res

November Budget - Hi Craig, Attached is last month's budge

Questions - Hey guys, I have a few questions about the bene

Event: Lunch @ Weekly from 12pm to 1pm on Tuesday,

for a road trip next weekend? - I was thinking that maybe

Plan Coming! - Hi Heidi, Thanks for all the information! Cra

Group visiting tomorrow - All, We'll have some visitors fro

Green Bed - \$300 or best offer - Let me know if you're inter

itation: Lunch @ Wed Aug 31 12pm - 1pm (craig@cloudeas

Gmail then filters *all* messages that meet *all* the criteria you select. That is, the criteria are linked together with an implicit “AND.” The more fields you select, the more focused your filter will be. In the example above, Gmail interprets the filter as: *Watch for all messages from “ben@cloudeasel.com” (AND) where the word “budget” appears in the Subject line (AND) where the word “report” appears anywhere in the message (AND) if it has an attachment.* When Gmail receives a message that meets all four of these criteria, it will perform one or more actions on that message. Which actions? That’s what we’re going to define next!

## Step 2. Define what actions to take on filtered messages

Clicking the **Create filter with this search** link does two things. First, it finds any *existing* messages that meet the criteria you just defined. It also opens another screen where you can define one or more actions to take on these messages. For example, you could have the message skip the Inbox and go immediately to the Finance label. You could mark it as important and add a star. Or you could make sure it’s never accidentally marked as Spam.

Our example is quite simple. We just want to apply the **Finance** label to these messages so they show up more clearly in our Inbox. To do this:

1. Select one or more of the available options. In our case, we select **Apply the label** and choose the **Finance** label.
2. Optionally, apply the filter to the five existing messages that already meet our filter’s criteria.
3. Click **Create filter**.

from:(ben@cloudeasel.com) subject:budget rep

« back to search options

When a message arrives that matches this search:

☐ Skip the Inbox (Archive it)

☐ Mark as read

☐ Star it

☒ Apply the label: Finance

☐ Forward it add forwarding address

☐ Delete it

☐ Never send it to Spam

☐ Always mark it as important

☐ Never mark it as important

Create filter

☒ Also apply filter to 5 matching conversations.

## Your filter at work

With the filter created, new messages from Ben Brown that have the word “budget” in the Subject, “report” in the body, and any kind of attachment, automatically display in your Inbox with the **Finance** label.



Select a color for the label to make it show up even more prominently!

☆	Ben Brown	<b>Finance</b> November Budget - Hi Craig, Attached is last month's bu	📎
★	Chris McCool	Benefits questions - Hey guys, I have a few questions about the b	
☆	Ben Brown	Canceled Event: Lunch @ Weekly from 12pm to 1pm on Tuesda	📅
★	Kevin .. Ben, me (6)	Anyone up for a road trip next weekend? - I was thinking that ma	
☆	Ben Brown	<b>Finance</b> October Budget - Hi Craig, Attached is last month's bud	📎
☆	Elly Eagleston	Logistics Group visiting tomorrow - All, We'll have some visitors	
☆	Sally Summers	For sale: Queen Bed - \$300 or best offer - Let me know if you're in	
☆	Ben Brown	Updated Invitation: Lunch @ Wed Aug 31 12pm - 1pm (craig@cloud	📅

## Manage your filters in Gmail Settings

If you later want to see all your filters, change a filter's criteria, or delete a filter, open your Gmail **Settings** from the **Gear** menu (1). Then go to the **Filters** tab (2) to edit or delete a filter. (You can create a new filter here, too.)

The screenshot shows the 'Settings' page for Google Apps, specifically the 'Filters' tab. A red box labeled '2' highlights the 'Filters' tab in the navigation bar. A red box labeled '1' highlights the 'Settings' option in a dropdown menu that appears when the gear icon is clicked. The main content area lists three filters applied to all incoming mail, each with 'edit' and 'delete' links. A 'Create a new filter' button is at the bottom.

**Settings**

General Labels Accounts **Filters** Forwarding and POP/IMAP Chat W

The following filters are applied to all incoming mail:

Matches: <b>(hubco OR "hub co")</b> Do this: Apply label "Hubco & Tufco"	<a href="#">edit</a>	<a href="#">delete</a>
Matches: <b>from:(elly@cloudeasel.com)</b> Do this: Apply label "Logistics"	<a href="#">edit</a>	<a href="#">delete</a>
Matches: <b>from:(ben@cloudeasel.com) subject:budget report has:attachment</b> Do this: Apply label "Finance"	<a href="#">edit</a>	<a href="#">delete</a>

[Create a new filter](#)