



5 Create Filters to Automate Email Handling

This chapter explains how to...

- Create filters
- Understand the conditions and actions of a filter
- Use wildcards when creating filters

Email filtering allows you to define rules to manage incoming email. Filtering applies a set of rules to incoming email and then executes a specified action. You can filter your incoming email messages to:

- Sort them into folders
- Automatically tag them
- Forward them
- Discard them

For example, you could create rules as follows:

- All email from your supervisor goes into your **Management Directives** folder.
- All email from the **corporate-events** mailing list is tagged with the **Events** tag.
- All email from a specific address goes into the Trash folder.

Filter Conditions & Actions

Each filter rule consists of one or more conditions and one or more actions.

Conditions

For example, if your supervisor sends you emails from more than one address, such as jane.smith@company.com or jane-smith23@yahoo.com, you could create one filter called **Supervisor** which has two conditions, one for each email address.



Conditions include:

- Specific addresses in the **From, To, Cc** addresses in the email header
- Email messages that are under or over a specific size. Size can be specified as B, KB, or MB
- Date is before or after a specified date
- The presence or absence of file attachments
- Specify that addresses that are or are not in your Address Book.
- Words or character strings in the subject or body of the email message

All the conditions allow you to specify **not** as a negative condition. For example, you can specify email that does not contain a particular word.

You can combine conditions to search for email with more complex characteristics.

Actions

Each filter rule can specify one or more actions. Actions include:

- Leave the message in the Inbox (no action)
- Move the message to another specified folder
- Tag the message
- Mark the message as read or as flagged
- Discard the message. This action drops the email message silently, which means that the message does not reach your mailbox. It is not the same as the Delete action on your menu. Deleting an item moves it to the Trash folder.
- Forward the message to a specified email address



Check **Do not process additional filters** to prevent the application of any other filter rules to email messages that match this current rule. If it is not checked, subsequent filter rules are evaluated for the email message even if the current filter is a match. You probably don't want to have the same message match more than one filter rule and undergo multiple, perhaps contradictory actions.



Using Any and All

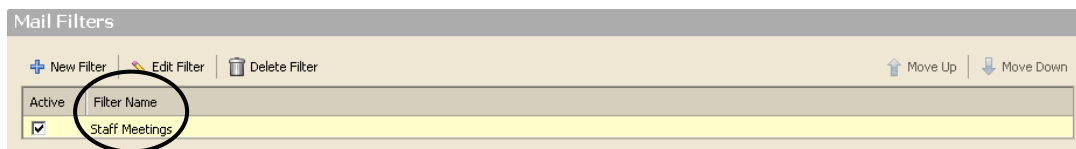
Conditions within a filter rule can be grouped using **Any** or **All**. The use of these terms is similar to **And** versus **Or** type searches, with **Any** being **Or** and **All** being **And**.

- **Any**. A message that meets any one of the conditions is considered a match.
- **All**. Every condition specified in that filter rule must match in order for that message to match the filter.



When Filters are Used

All filters currently defined are listed on the **Preferences > Mail Filter** tab. The **Active** check box allows you to turn filters on or off without having to delete the filter rules.

Each incoming message is tested against your active filter rules when it is delivered, and the filter actions are applied to matching messages at that time.



Filter Order

Filters are applied in the order they are listed on the **Mail Filters** tab. You can change that order at any time using  and .

The conditions are used to test each email message. If the message meets the conditions collectively (using the **Any** or **All** designation as specified in the filter rule), it is a match. The order of the conditions within each filter is not important.

If the message matches the conditions, all actions associated with that filter rule are applied, in the order in which they appear in the filter.

Creating a Filter

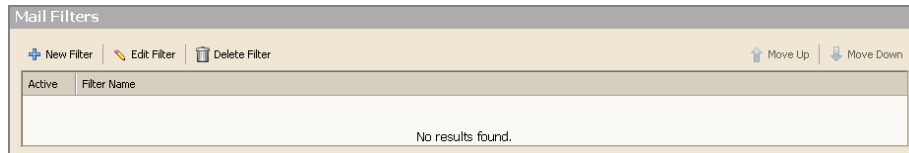
You can create a filter in two ways:

- Using the Preferences > Mail Filters tab
- Using a message in the Inbox

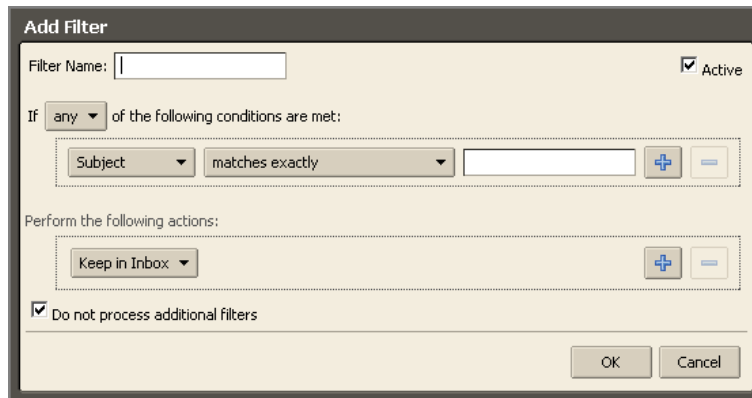
Creating a Filter from the Mail Filters Tab

To create a new filter using the **Preferences > Mail Filters** tab:

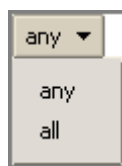
1. Select the **Preferences > Mail Filters** tab.



2. Click . The **Add Filter** dialog displays.



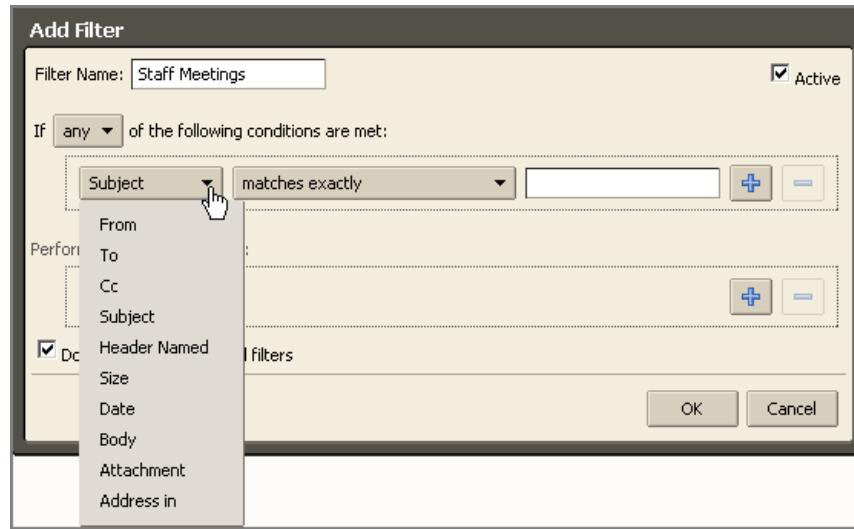
3. Type the name for the rule into the **Filter Name** field.
4. In the **If the following conditions are met** area, choose a grouping preference.



- **Any** means that if any of the conditions in the filter are met, apply the action.
- **All** means that all of the conditions in the filter must be met to apply the filter action.

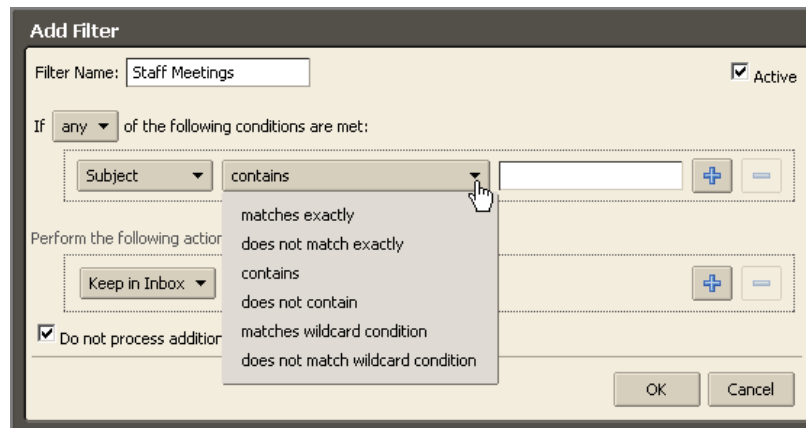
Steps 5-11 can be repeated to set up multiple conditions and actions within a single filter:

5. Select from the first drop-down list which part of the email to filter. For example, choose an email field, a portion of an email message, or an email address.




In the above example, **Subject** is selected. Therefore, the Subject of all incoming emails will be filtered.

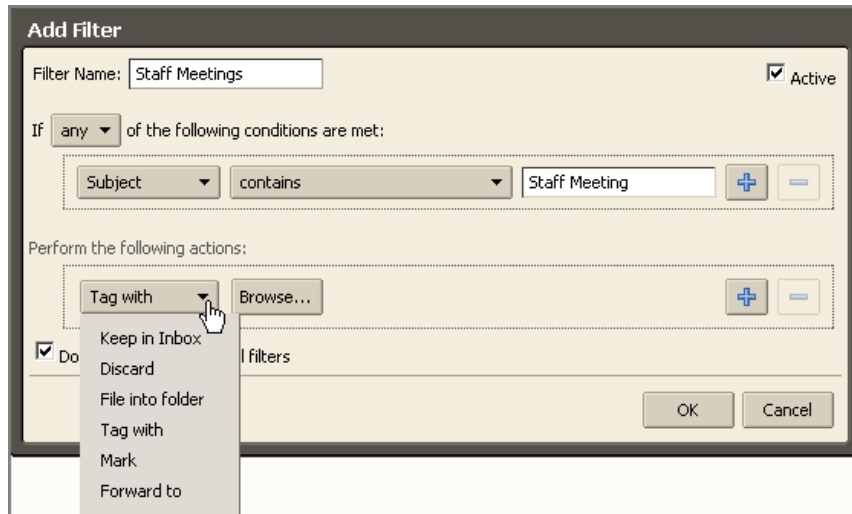
6. Choose a comparison method. The options shown depend on your choice in the previous step.



In the above example, **contains** is selected. Therefore, the filter will look for Subjects that contain certain text.

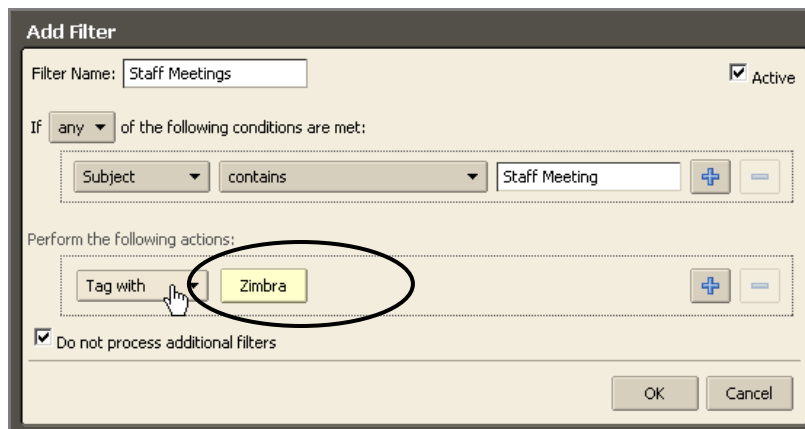
7. Enter a word or phrase to compare against in the text field. For example, enter **Staff Meeting** to filter all messages containing **Staff Meeting** in the Subject.
8. Click  to add more conditions, if needed. You can continue to add more conditions or proceed to add one or more actions.

9. Choose an action from the drop-down list in the **Perform the following actions** area.



In the above example, **Tag with** is selected. Therefore, the filter will tag email messages with a Subject containing **Staff Meeting**.

10. Specify a folder or tag name, if necessary. What you specify depends on the action you chose in the previous step.



In the above example, the **Zimbra** tag is selected. Therefore, all incoming email messages that have a Subject containing **Staff Meeting** will be tagged with the Zimbra tag.

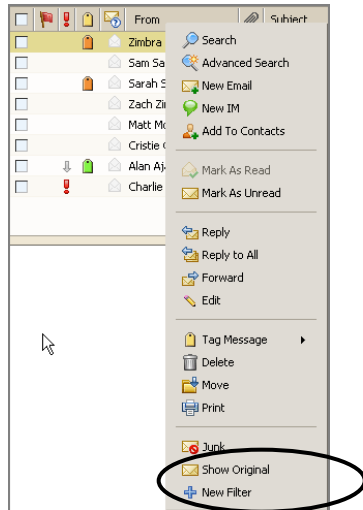
11. Check **Active** (upper right corner of Add Filter box) to turn on the filter rule.
12. Click to add more actions or click to finish.

The filter will be applied automatically to all new incoming email messages as they arrive.

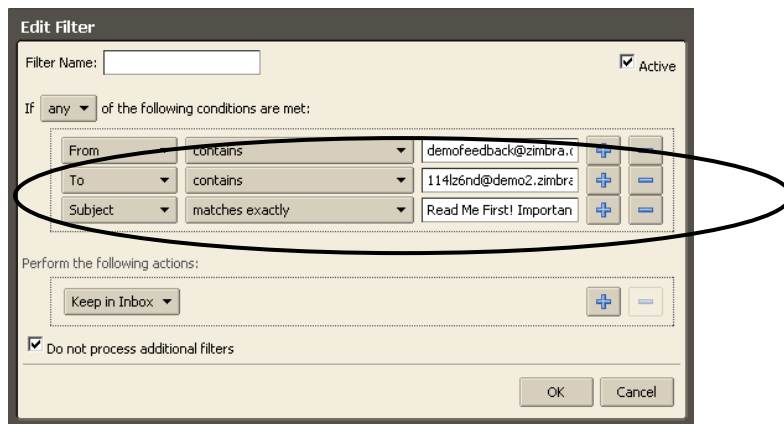
Creating a Filter from an Email Message

To create a new filter from an email message:

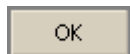
13. Right-click on the message and choose **New Filter**.



14. The **Edit Filter** dialog displays with **From**, **To**, and **Subject** set with this information from the email message.



15. If the filter conditions are correct, enter a name in the **Filter Name** field and click

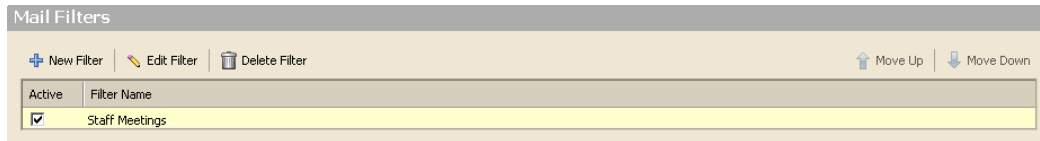


You can change the conditions and actions as necessary using the drop down menus in the Edit Filter dialog.

Editing a Filter


To edit a filter:

1. Select the **Preferences > Mail Filters** tab.



2. Click . The **Edit Filter** dialog displays.



3. Use the drop-down menus and fields to edit the filter as necessary.
4. Click .

Filter Conditions and Actions Supported

This section describes the conditions and actions supported by ZWC filters. Filter rules are not case-sensitive, so the rules ignore capitalization.

Conditions

Comparison fields include those in the following table.

Comparison Field	Description
From	Use this to specify a From name in an email message.
To	Same as From, but looks for specified names in the To header.
CC	Same as From, but looks in the Cc header.



Comparison Field	Description
Subject	Looks in the message's Subject header.
Header Named	<p>When this option is selected, an additional text input field appears before the comparison operator (the contains portion). This option allows you to specify any email header. You can specify the standard fields of To or From and Date, Reply-To, or other custom fields that may be included in the message header.</p> <p>You could use this option to filter out email messages that have malformed headers, meaning they do not contain certain information that is normally considered standard for an email message. Sometimes spam, which is automatically generated, omits information such as the Sender or Reply-To fields. Use the second text field (the field immediately to the right of the comparison operator) to specify the header to test for.</p>
Size	Use this to select email messages that are larger or smaller than a specified size, including any file attachments. You can use this to discard email messages that are too large.
Date	Use this option to specify email messages sent before or after a specified date.
Body	The options for Body are Contains and Does not contain. This allows you to specify matching words in the body of the email. You cannot filter for words in file attachments.
Attachments	You can filter for email messages with or without attachments.
Address In	Tests for an address in your contacts and allows you to specify an address.



Comparison operators include those in the following table.

Comparison Operator	Description
Matches exactly/does not match exactly	Specifies an exact match. For example, specifying Subject matches exactly Banana would only match Banana and not Bananas or A truck full of banana leaves.
Contains/does not contain	Specifies that the subject line must contain the specified substring. For example, specifying Subject contains Banana would match I'm going bananas.
Matches wildcard condition/does not match wildcard condition	Specifies that the subject must match the specified string, which includes wildcards. For example, specifying bana* would match banana and banana tree but not free bananas . The wildcard * is a character used in the email filter comparison field to represent one or more characters in the filter.
Exists/does not exist	Matches if the specified field is present in the message. Used with the Header Named and Attachment fields.
Under/not under, over/not over	Used for comparison against the Size field.
Before/not before, after/not after	Used for comparison against the Date field.
In/not in	Used to test for presence of an address in your contacts.



Actions

Available actions include those in the following table.

Action	Description
Keep in Inbox	Saves email to Inbox. If none of the filter rules match an email message, this action takes place by default.
File into Folder	Moves the email to a specified folder.
Discard	Deletes the email message without delivering it. The message is not in any of your folders, not even Trash.
Forward To	Forwards email to the address you specify.
Stop Evaluation	This action prevents subsequent filter rules from being applied to any message that matches the current one.
Mark	Select as Read or as Flagged .
Tag with	You can tag matching messages with a selected tag.



Multiple Actions

A filter rule can specify multiple actions. The combinations of actions are interpreted as described in the following table.

Multiple Action	Description
Discard	If combined with other actions, discard is ignored and the other actions take place.
Stop Evaluation	Actions specified after this one are ignored.
File into folder	Multiple file into actions results in multiple copies of the message being stored in different folders. If a specified folder does not exist, the message is saved to the Inbox.
Tag/Mark	These actions apply to the message returned from the nearest preceding action. In the case of multiple file into actions, this could result in some copies of the message stored without a tag, and others stored with a tag.
Keep in Inbox	Multiple keep actions can be specified, but only one copy of the message is saved to the Inbox.

Filter Wildcards

Wildcards can be used in comparisons that use the **Matches pattern** comparison operator. The two wildcard characters are * and ?

Asterisk (*)

The asterisk is a placeholder for zero or more characters of any type.

Example	Match
Subject-line search string: banana*float	Subject lines such as bananafloat, bananas, banana-leaf casserole float but not super-banana-float

Subject-line search string: w*bandanna	Subject lines such as white bandanna or whose bandanna but not whose bandanna is this?
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Question Mark (?)

The question mark is a placeholder for exactly one character.

Example	Match
Subject-line search string: banana?boat	Subject lines such as bananasboat, banana-boat, banana!boat, or banana boat

Escape Character is Slash: \

There may be times that you want to specify an exact match on a string that contains characters that normally are considered wildcards.

For example, you might want to specify a match on a subject line where the main heading is surrounded on both sides by three asterisks, such as:

- *****MORE MONEY!!!*****
- *****FREE GIFT*****

To specify a wildcard as itself rather than a substitution for other characters, use the backslash \ immediately before the character. For example the comparison string `*****` specifies a subject with three asterisks before and after any string in the middle (including spaces).

