

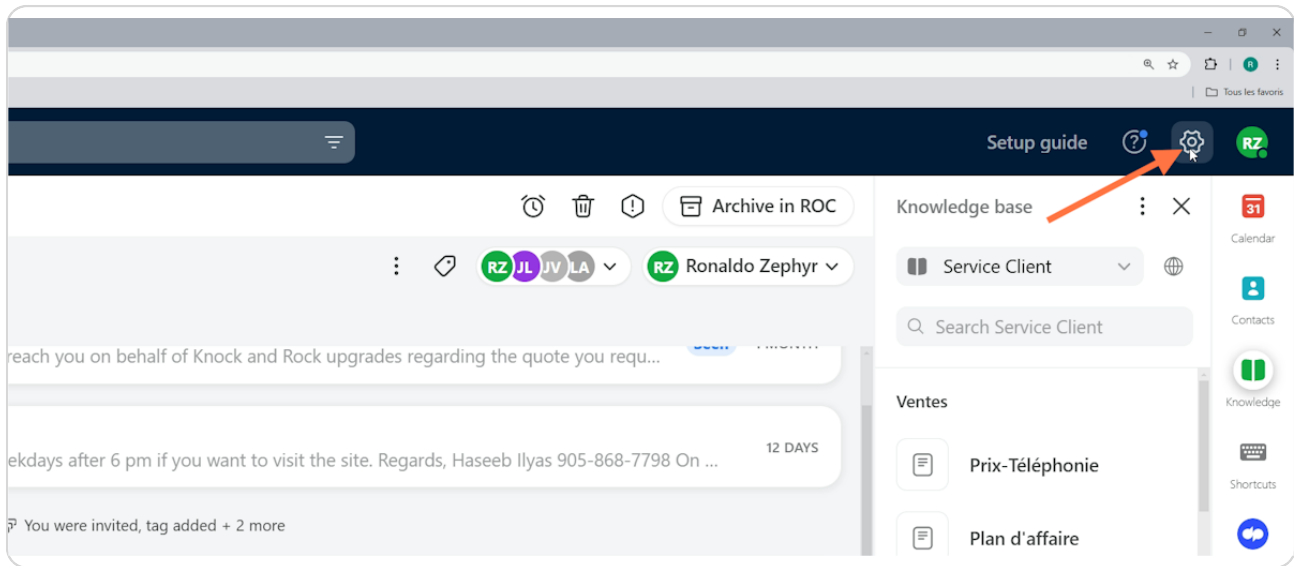
Creating rule (new client

18 Steps [View most recent version](#) 

Created by	Creation Date	Last Updated
Ronaldo Zephyr	Nov 26, 2024	Nov 26, 2024

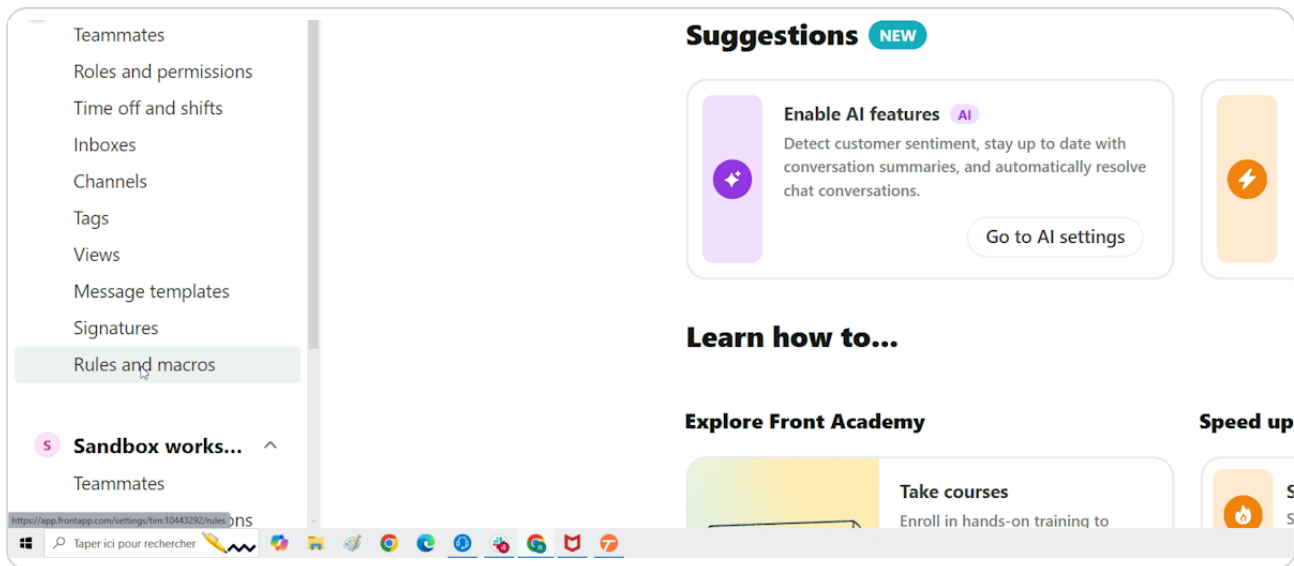
STEP 1

Go to the settings



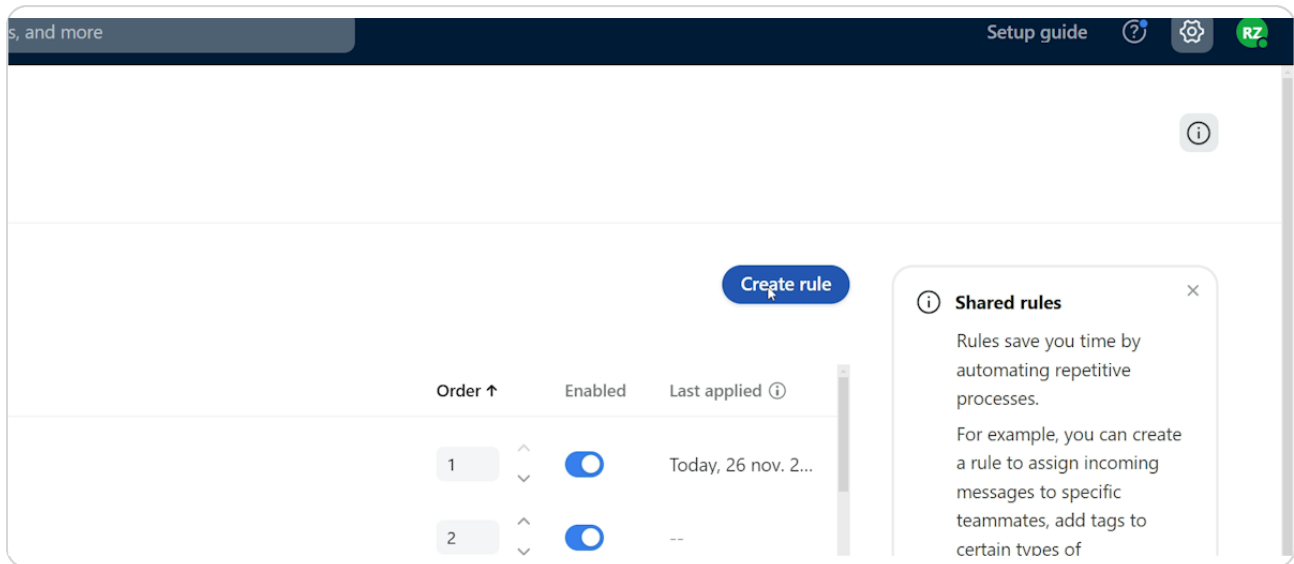
STEP 2

Select rules and Macros in the Admissis section



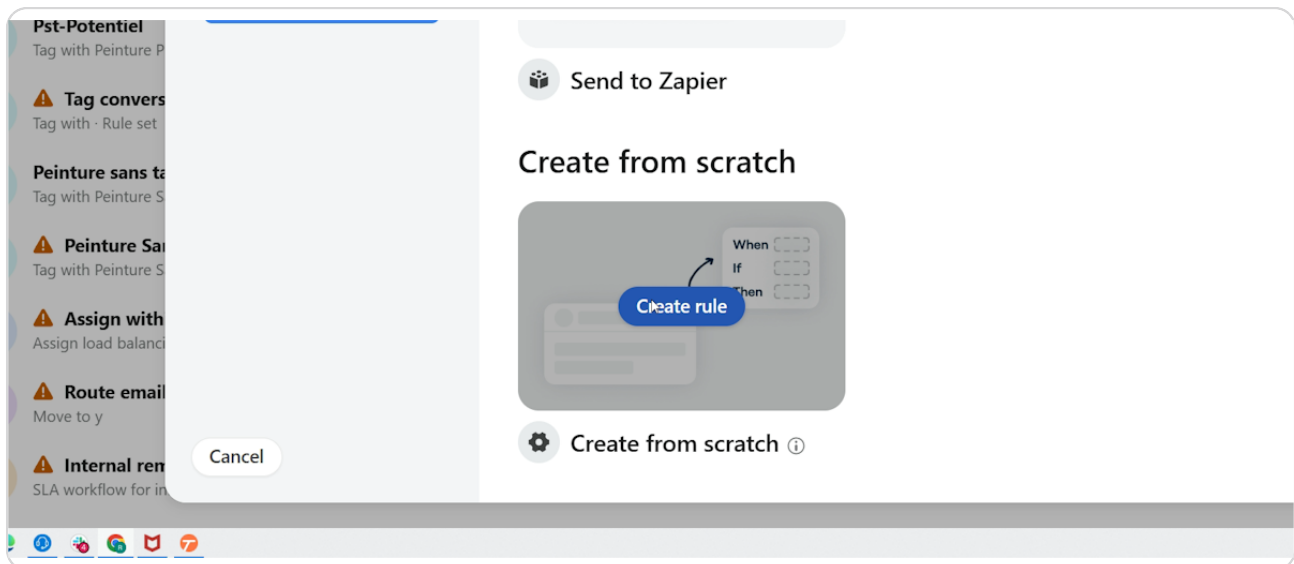
STEP 3

Click Create rule



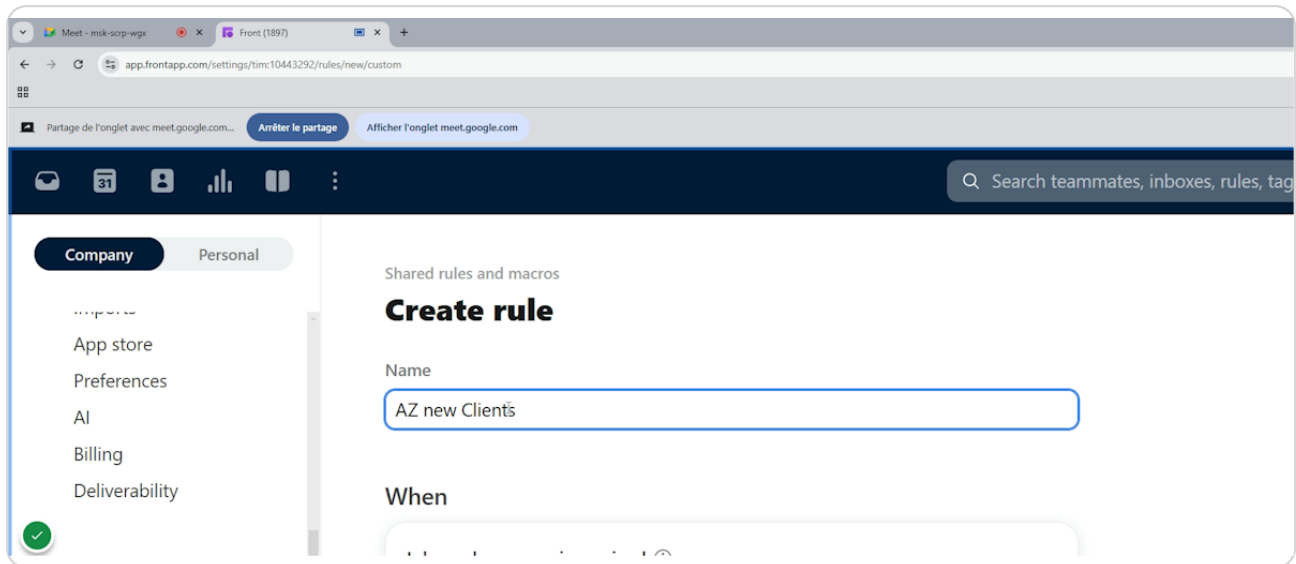
STEP 4

Select Start from scratch



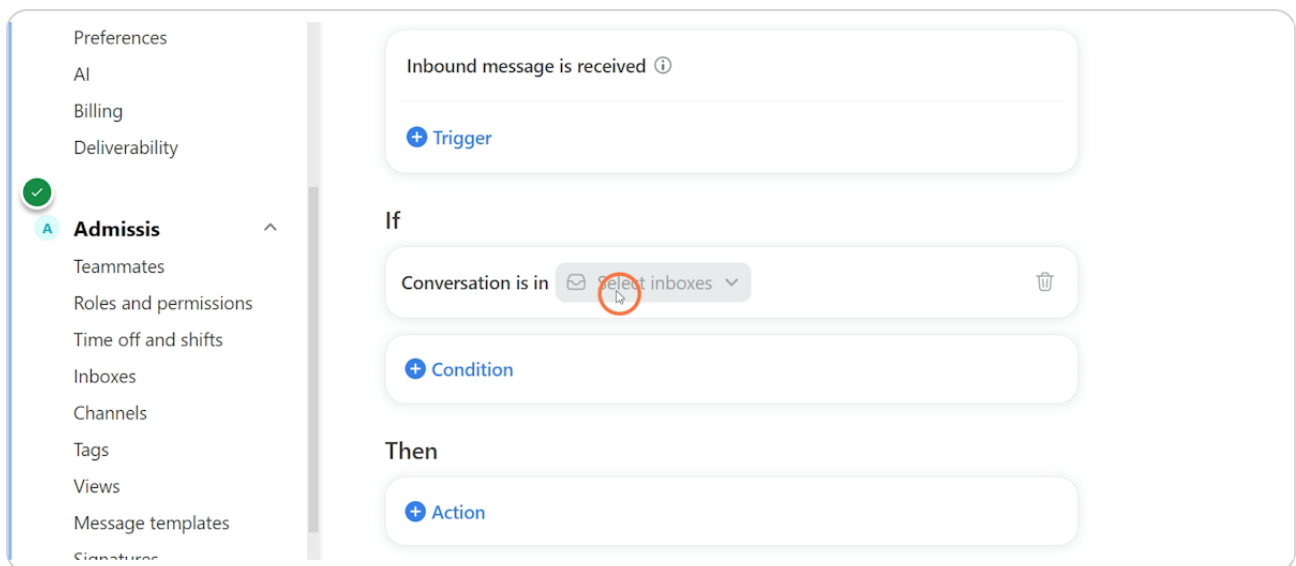
STEP 5

Give the rule a title : company name + new clients



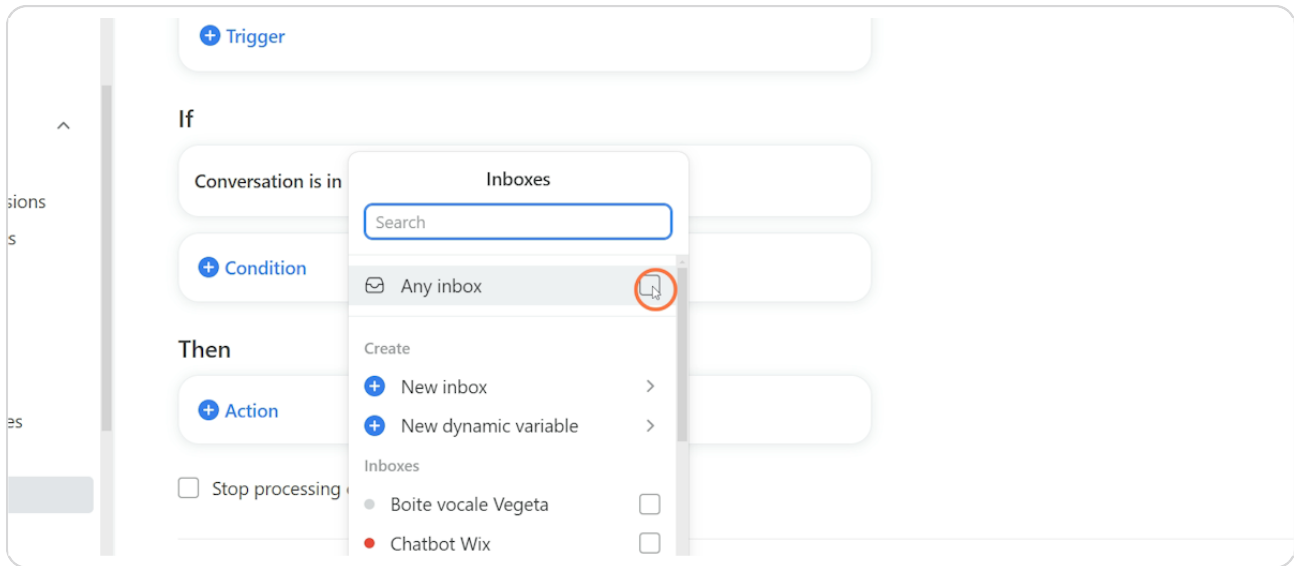
STEP 6

Click here



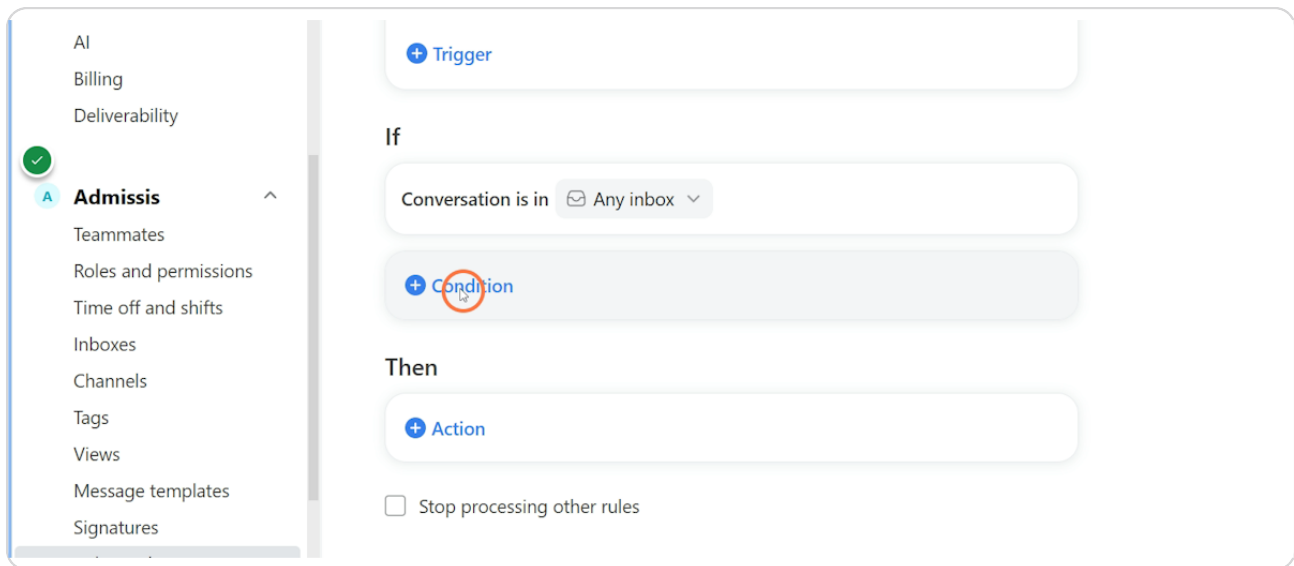
STEP 7

Select any inbox



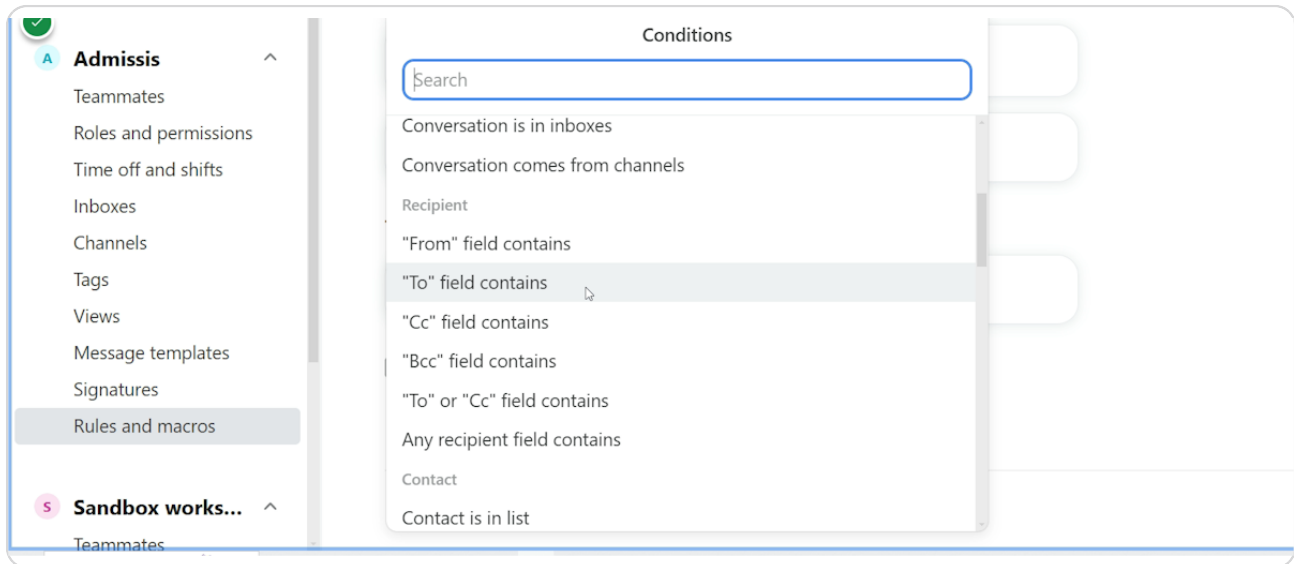
STEP 8

Add the first condition



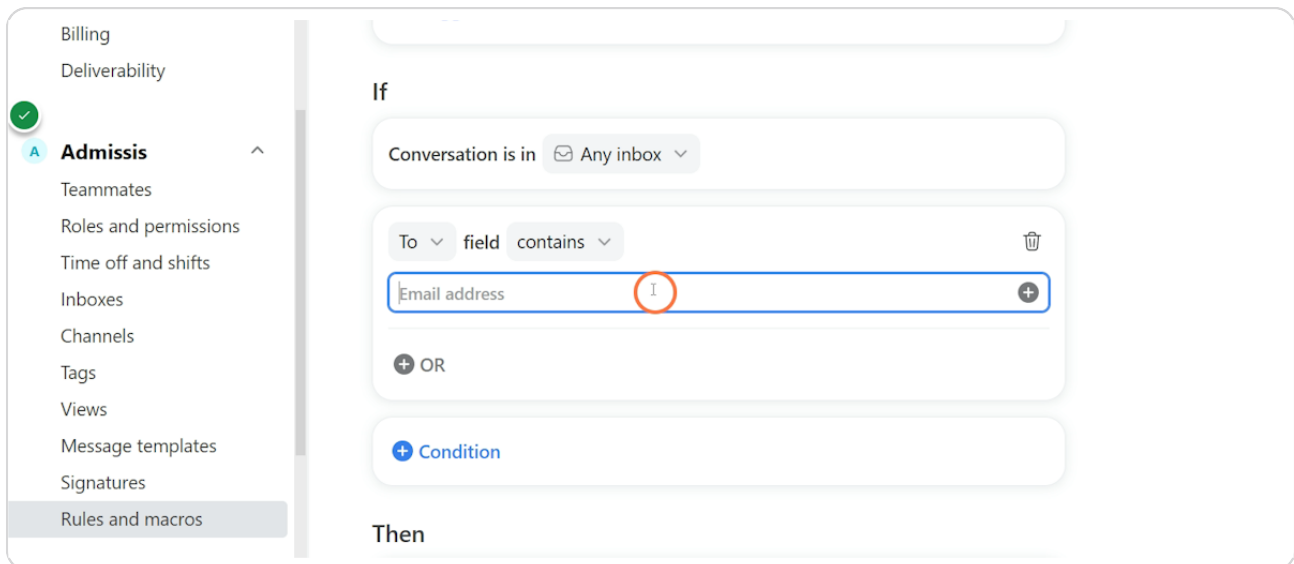
STEP 9

select : to field contains



STEP 10

paste the contractors Admissis email in the email field



STEP 11

Add the second condition DO NOT SELECT OR

The screenshot shows a rule configuration interface. On the left is a sidebar with a list of categories: Admissis (checked), Sandbox works..., and Teammates. Under 'Admissis', there are sub-items: Teammates, Roles and permissions, Time off and shifts, Inboxes, Channels, Tags, Views, Message templates, Signatures, and Rules and macros (highlighted). The main area shows a rule configuration. The first condition is 'To field contains customershomerenovations@gmail.com'. Below it is a '+ OR' button. A '+ Condition' button is highlighted with a red circle. Below the conditions is a 'Then' section with a '+ Action' button.

STEP 12

Chose conversation subject contains

The screenshot shows a rule configuration interface. On the left is a sidebar with a list of categories: App store, Preferences, AI, Billing, Deliverability, Admissis (checked), and Teammates. Under 'Admissis', there are sub-items: Teammates, Roles and permissions, Time off and shifts, Inboxes, Channels, Tags, Views, and Message templates. The main area shows a rule configuration. The first condition is 'Contact custom field contains'. Below it is a list of conditions: Tags, Conversation has specific tags, Conversation doesn't have specific tags, Conversation has no tags, Content, Conversation subject contains (highlighted with a red circle), Email headers contain, Message body contains, and Message HTML body contains. A '+ Condition' button is highlighted with a red circle. Below the conditions is a 'Then' section.

STEP 13

Add : Contact details of the client you bought to the subject line

The screenshot shows a configuration box for a rule. At the top, it says "Conversation subject" followed by a dropdown menu currently set to "contains". Below this is a text input field containing the word "Subject" and a plus icon on the right. Underneath the input field is a horizontal line, followed by a button that says "+ OR". Below that is another button that says "+ Condition".

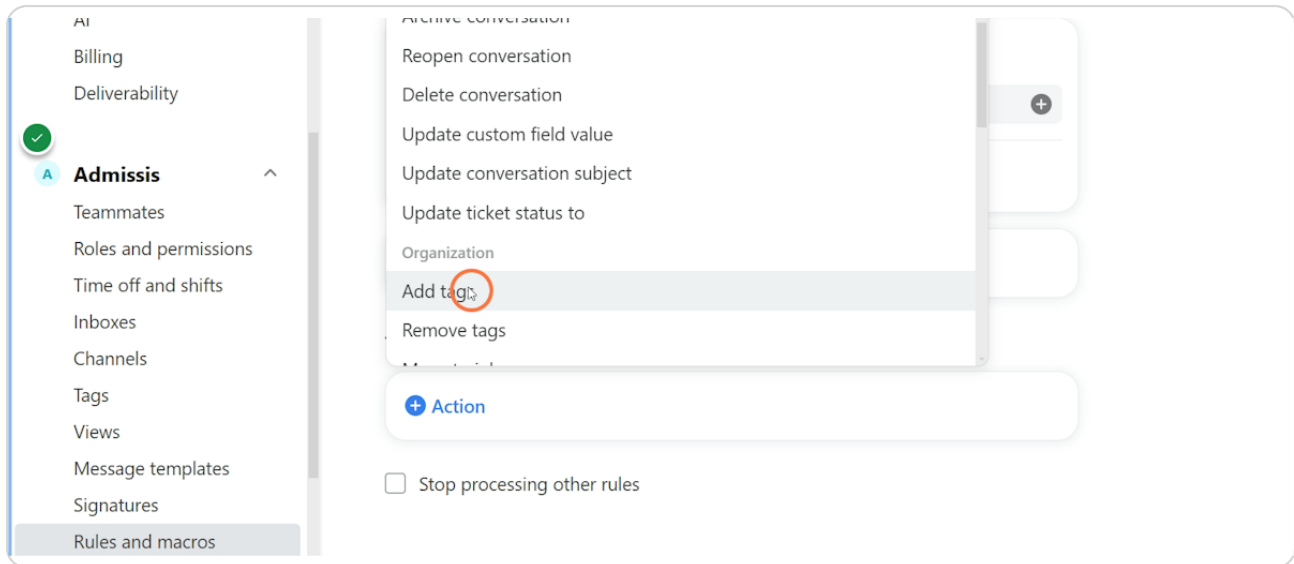
STEP 14

Select action button

The screenshot shows the same configuration box as in Step 13, but with a sidebar on the left. The sidebar has two main sections: "Admissis" (with a green circle icon) and "Sandbox works..." (with a pink circle icon). Under "Admissis", there is a list of items: "Teammates", "Roles and permissions", "Time off and shifts", "Inboxes", "Channels", "Tags", "Views", "Message templates", "Signatures", and "Rules and macros" (which is highlighted). Under "Sandbox works...", there is one item: "Teammates". In the main configuration area, the "Then" section is visible, showing a button that says "+ Action" with a red arrow icon. Below this button is a checkbox labeled "Stop processing other rules".

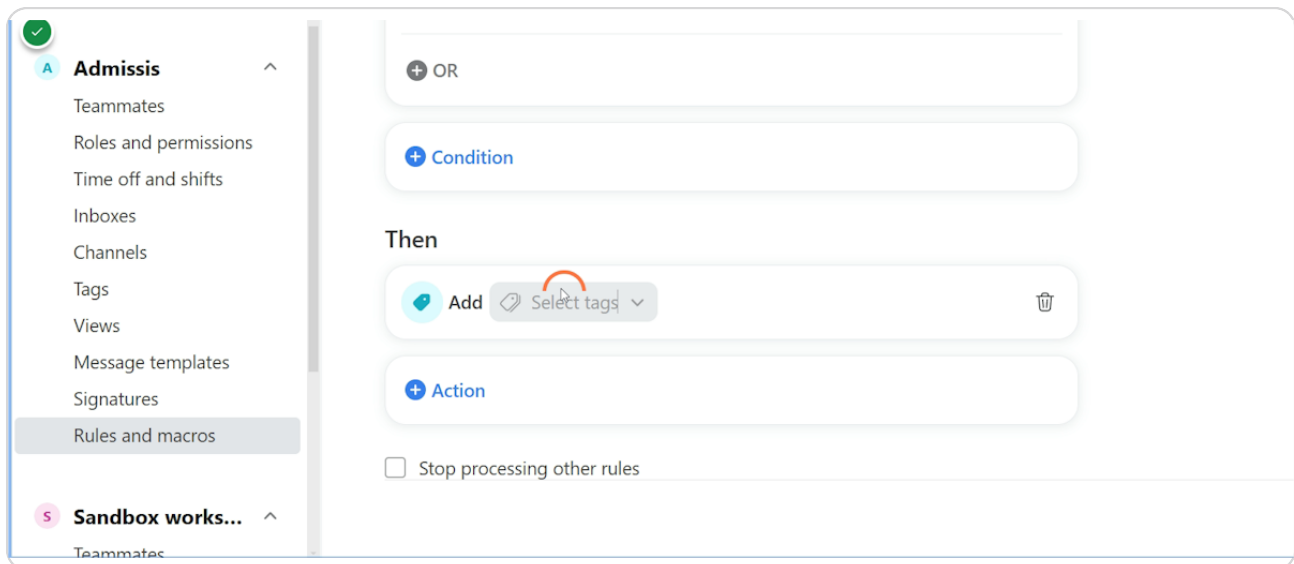
STEP 15

Select add tags



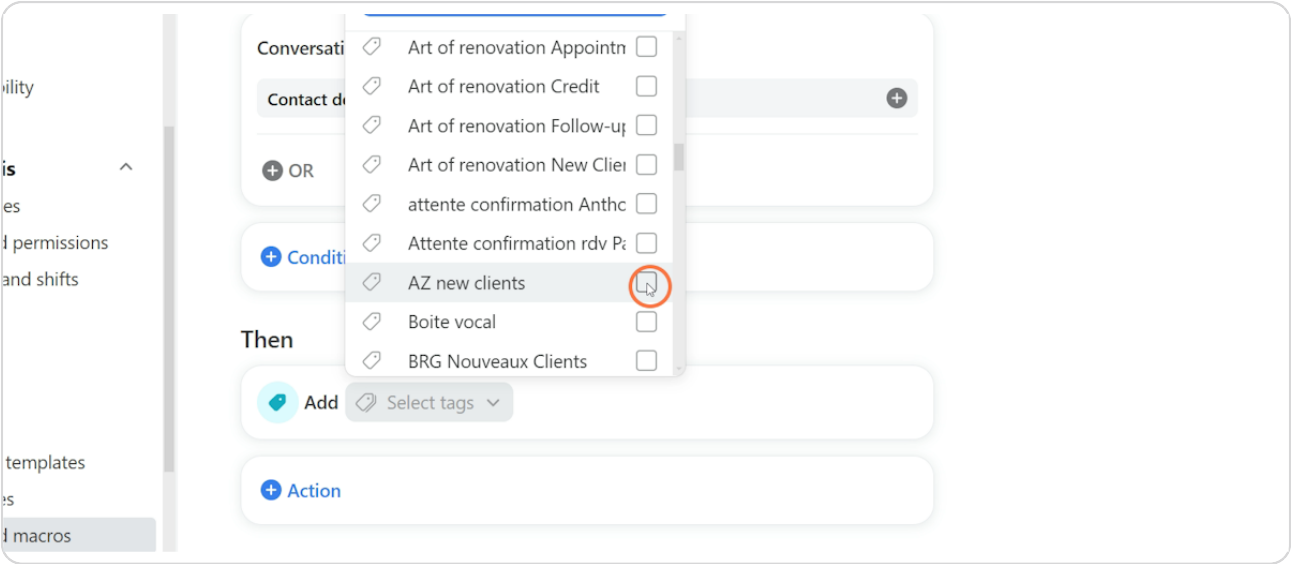
STEP 16

select the created tag for the contractors new clients



STEP 17

Click here



STEP 18

Click Create

